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WDA Gives Away 'Super' Store at Louisville
Special Louisville RV Show Section

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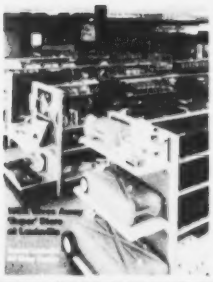
A Trailer Life Publication

RVDealer®

THE RV BUSINESS MAGAZINE
THAT KNOWS THE RV BUYING PUBLIC



ON THE COVER: WDA is going to Louisville this year in a big way, hosting seminars, exhibiting a model parts and accessories store (similar to the one shown on this month's cover) and giving away the entire store — valued at $25,000 — to a lucky dealer. See the full report on page 44, and turn to page 51 for the start of our show section.

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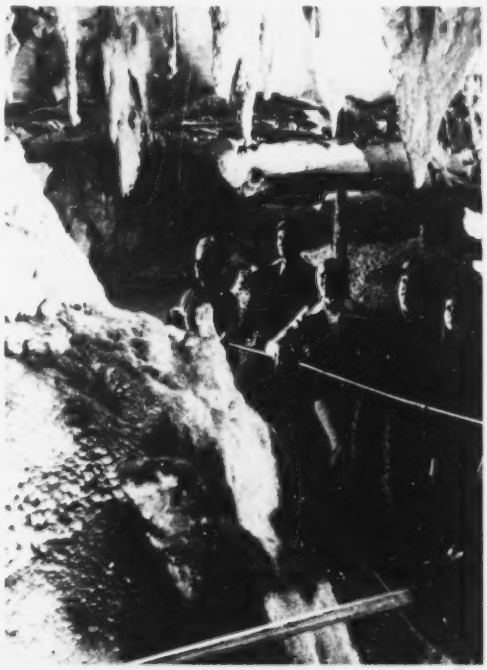

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The Exclusive Monthly
RVDealer Business Report

How's Business?

Sales volume of increase or decrease by individual DAB members	
For month	4 up (21%)
	15 down (79%)
Year to date	2 up (11%)
	17 down (89%)

SALES VOLUME		
For Month	This year $2,712,868	−31%
	Last year $3,923,091	
Year to Date	This year $27,412,346	−36%
	Last year $42,658,524	

TOTAL UNIT SALES		
For Month	This year 346	−21%
	Last year 440	
Year to Date	This year 3,306	−29%
	Last year 4,631	

NEW UNIT SALES		
For Month	This year 200	−27%
	Last year 275	
Year to Date	This year 2,128	−30%
	Last year 3,039	

USED UNIT SALES		
For Month	This year 146	−12%
	Last year 165	
Year to Date	This year 1,178	−26%
	Last year 1,592	

The last "good month" of the year is over and it wasn't very good. Actually, the percentage figures ran a little better than the average for the year, but considering that those figures are rather dismal, it's nothing to shout about. The pattern for September is quite similar to that of August. Both are disappointing after a relatively good July when it appeared that a turnaround had been reached. Apparently a leveling out has not occurred.

Four of the 19 DAB members were up in sales volume for September compared to last year. Fifteen were down. Year to date, 17 (89%) are down from last year. Since 1979 was a very bad year, it's obvious that dealers are not getting fat.

However, many dealers on the advisory board report that their efforts to control operating costs have been so successful that they're making money. Generally, they're making less than before, but what they're doing is acceptable.

Camping trailers are still holding up relatively well. This September's sales were almost identical with those of last year. Year to date, the drop is lower than that of any other RV type. Both new and used show a 16% drop for the year, which is an impressive figure when compared with other RV types.

There shouldn't be anything baffling about the relative success in folding trailer sales. Small cars—small trailers. It follows.

Fifth-wheel sales have picked up a bit during the later part of the summer. Perhaps the snowbirds are preparing for the annual flight south in new rigs. Although the unit figures are relatively small, the percentages are second best for the year among RV types. Down 30% is nothing to crow about, but it's better than the figures in three other RV categories.

Used fifth-wheels apparently sell well. Both for the month and for the year to date, sales figures are up for the DAB. It's the only category with that distinction.

Travel trailer sales are running a steady percentage down from last year. With sales off over a third, dealers of this type aren't too happy. Sales of lightweight units are promising. Unfortunately, they still seem to be more promising than actual. Used sales have been running approximately 10% better than new.

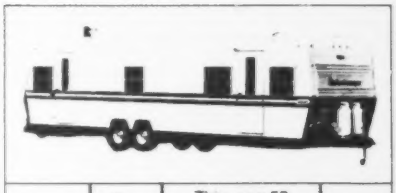
The lineup of '81 model cars must be discouraging for travel trailer dealers. Only one passenger car is rated capable of towing a large trailer. And the tow vehicle problem is going to get worse. The *realities* may not all be clear, but the *indications* are obvious.

Note: Data for this report is provided by RVDealer's own Dealer Advisory Board. This group consists of a wide variety of sizes and types of RV dealerships and represents a cross section of all dealers in the United States.

motorhomes

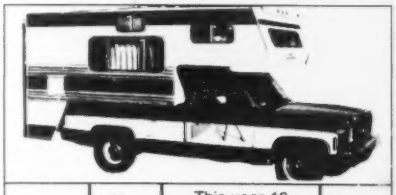
NEW	For Month	This year 43	−45%
		Last year 78	
	Year to Date	This year 335	−43%
		Last year 623	
USED	For Month	This year 54	+4%
		Last year 52	
	Year to Date	This year 331	−15%
		Last year 391	

travel trailers



NEW	For Month	This year 58	−36%
		Last year 90	
	Year to Date	This year 504	−37%
		Last year 804	
USED	For Month	This year 50	−25%
		Last year 67	
	Year to Date	This year 467	−28%
		Last year 649	

truck campers



NEW	For Month	This year 16	−16%
		Last year 19	
	Year to Date	This year 198	−44%
		Last year 352	
USED	For Month	This year 10	−44%
		Last year 18	
	Year to Date	This year 123	−51%
		Last year 253	

RVIA Shipment Figures

The marketing committee of the Recreation Vehicle Industry Association has announced that the total number of recreational vehicles shipped from manufacturers' plants during August 1980 was 15,200, down 26.6% from August of 1979.

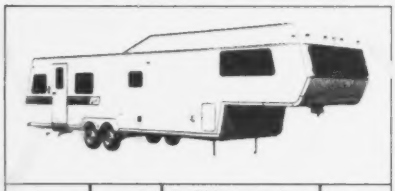
The shipment figures released by the association are contained in a report compiled for the membership by RVIA's marketing committee under the chairmanship of John Agno of the Thetford Corporation.

RV shipments were as follows in August 1980		August 1979	Percent Change	Cumulative 1980	Cumulative 1979	Percent Change
TRAVEL TRAILERS	3,500	4,700	−25.5%	30,300	58,300	−48%
FIFTH-WHEELS	400	1,000	−60%	3,900	11,900	−67.2%
TRUCK CAMPERS	300	900	−66.7%	3,600	11,300	−68.1%
MULTI-USE VEHICLES	7,000	7,800	−10.3%	45,000	81,600	−44.9%
TYPE A: MOTORHOMES	800	1,300	−38.5%	5,900	17,200	−65.7%
TYPE B: VAN CAMPERS	0	200	−100%	1,700	2,900	−41.4%
TYPE C: MINI MOTORHOMES	1,500	2,700	−44.4%	10,200	31,200	−67.3%
FOLDING CAMPING TRAILERS	1,700	2,100	−19.1%	17,100	23,900	−28.5%
TOTALS	15,200	20,700	−26.6%	167,700	238,300	−50.6%

folding trailers

NEW	For Month	This year 70	−1%
		Last year 71	
	Year to Date	This year 1,012	−16%
		Last year 1,176	
USED	For Month	This year 28	+12%
		Last year 25	
	Year to Date	This year 220	−16%
		Last year 263	

fifth wheels



NEW	For Month	This year 13	−24%
		Last year 17	
	Year to Date	This year 59	−30%
		Last year 84	
USED	For Month	This year 4	+33%
		Last year 3	
	Year to Date	This year 37	+3%
		Last year 36	

Truck camper sales picked up in September according to the DAB. A drop of only 16% for the month is encouraging. However, the 44% drop for the year suggests that the market is still strongly off.

Although we do not include sales figures for "toppers" in this report, word from our board is that sales are strong. Hopefully, some of those topper buyers will decide to upgrade in the months to come.

Motorhome sales are still quite low compared with last year's. The downturn to a 45% drop from last September is considerably off from the drop of 29% last month and a disaster when compared with the 10% drop in July. The 43% decline year to date in new unit sales for the DAB is surpassed only by that of truck campers (44%). Obviously, a lot of motorhome dealers are hurting. **rvd**

This is the fourth in a series of exclusive articles for RVDealer in which Dr. Richard Curtin analyzes the significant findings of a study recently completed for the Recreational Vehicle Association on the subject of "The RV Consumer: Current Trends and Future Prospects."

Dr. Curtin is director of surveys of consumer attitudes at the Survey Research Center of the University of Michigan; he is regarded as one of the nation's foremost researchers in the area of consumer behavior.

Copies of the complete study are available from RVIA for $2, the cost of postage and handling.

Dr.
Richard T. Curtin

RV owners get their money's worth

For many would-be recreation vehicle owners, a frequent deterrent to their purchase of an RV is the fear they won't use their vehicle enough to get their money's worth. They have visions of their new RV rusting away in their driveway for all but the one week in the summer when they take it on their annual vacation.

That does happen with some RV owners, although mostly because the owners turn out to have less free time on their hands than expected and not because they discover they don't enjoy the lifestyle.

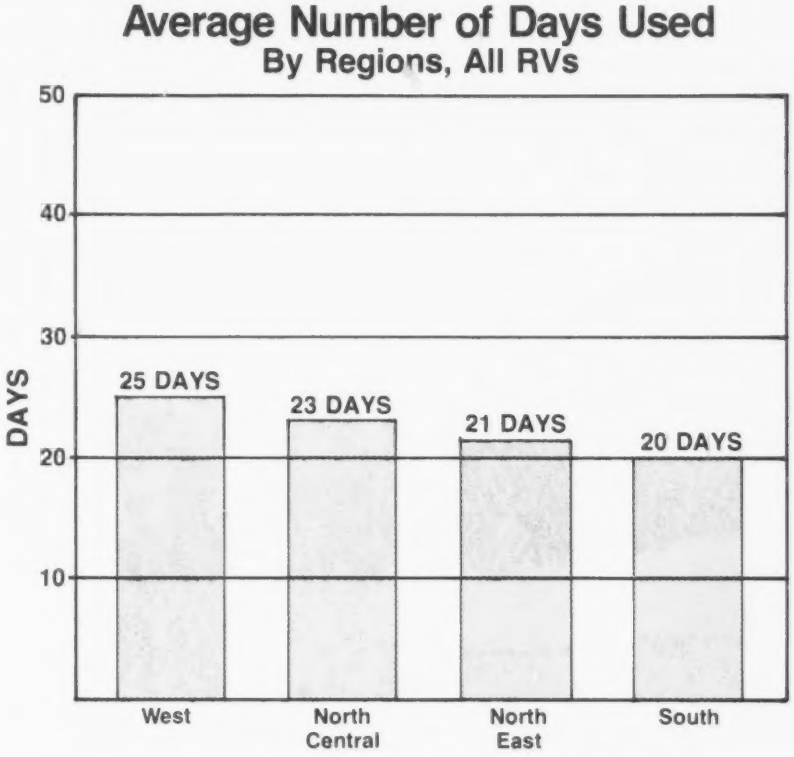
For the most part, however, the fear of non-usage is extremely ill-founded. The majority of America's six million RV families use their units more than just one week per year, and more than a quarter of them — some 1½ million families in total — spend anywhere from a month to four months in their vehicles. The average for all RV owners is 23 days per year.

We learned this by conducting a year-long study of American consumers at the University of Michigan Survey Research Center. In all, we interviewed by phone 7,511 families, of which some 8.3% reported ownership of either a motorhome, travel trailer, van conversion, truck camper or folding camping trailer. Our sample was scientifically selected.

The RV owners who get the most use from their vehicles are those who have motorized units, either motorhomes or vans. Nearly half of all motorhome owners use their vehicles at least one month and as much as four months per year. More than a third of the van owners get the same usage.

Towable owners, on the other hand, don't get nearly the same amount of use from their vehicles. When we asked our towable families how many of them spend at least one month per year using their units (actually, we said 30 to 119 days), less than a quarter of the travel trailer and truck camper owners and only 14% of the folding camping trailer families identified themselves as being in that group.

Travel trailer owners average only 20 days per year, truck camper owners 23 days and folding camping trailer owners just 10 days.



Now take a look at the motorized owners. The average number of days used by van owners is 25, the average for motorhome owners an extremely impressive 36.

What's most surprising about this finding is that much of the survey was made during 1979 when gasoline availability was a critical problem. When we asked about days used, we specifically requested our families to tell us how many days they used their RV in the *previous* 12 months, not how many they normally average. Before the results of our survey came in, it would have been hard to anticipate motorhomes making such a strong showing. If any one type of RV is most affected by a gas availability problem, it would have to be the motorhome. It leaves me to wonder just how high the average-days-used number for motorhomes, or for any RV for that matter, would be if our survey had been taken in 1978.

So why are motorhomes used so much more frequently than other types of recreation vehicles?

Could it be the average usage is inflated by a high percentage of full-timers, meaning owners who live in their units 365 days per year? That's a reasonable theory, but it's really not the case. Whereas half of all motorhome owners spend one to four months in their units, only five percent spend more than four months — so obviously there is not a whole lot of full-timers.

I believe there are two explanations for our finding and both apply not only to motorhomes but to vans as well. In fact, the second explanation applies even more to vans.

The first is the cost of a motorized unit

compared to a towable. Since motorized vehicles generally carry a heavier price tag, their owners try a little harder to make themselves feel they're getting their money's worth. Also, because motorized prices are higher, their buyers normally have higher incomes; with those higher incomes come greater benefits, such as vacation time.

The second explanation is in the versatility of motorized vehicles, particularly vans. Whereas a folding camping trailer, for example, has limited uses, a motorized unit can be used for commuting to and from work, for odd jobs or simply as a substitute station wagon for owners with big families or lots of friends. More than half of all van owners and 20% of all motorhome owners told us they use their vehicles for work. Two-thirds of the van owners and a quarter of the motorhome owners said they use their vehicles for "transporting more people."

These type of uses are not very widespread among the towable owners.

The versatility of the motorized unit, incidentally, could very well prove to be the key to success for the motorized segment of the industry in the years ahead. With the trend toward downsized automobiles, I would expect more and more consumers to be looking to the RV industry for products that can accommodate more than just four passengers. In fact, in my opinion, the multiple uses of motorized RVs should become the industry's primary selling point as the small car trend continues through this decade.

While we were involved in this particular phase of our study on usage patterns, we also took a look at how often RV owners in various demographic groups use their vehicles.

For example, we learned that RV owners 65 and older use their vehicles more often than owners in any other age category — an average of 34 days per year. Owners in the 45 to 54 age bracket are second with an average of 25 days.

RVers in the highest income class ($25,000 or more) average 24 days, more than those in any other income group.

Owners with no children or just one child at home also average 24 days. Those with two or more children use their vehicles less.

And finally, RVers in the West use their vehicles more than RVers in any other part of the country, no doubt due to the double incentive of generally favorable weather and some spectacular recreation areas in that part of the land. Their average is 25 days per year, compared to 23 days by owners in the North Central region, 21 days by Northeasterners and 20 days by Southerners.

One thing I found particularly interesting about Western RV owners is that they use their vehicles for work far more frequently than do other owners. About a quarter of the RV owners in the West told us they use their units for this purpose, while, to offer a comparison, only 11% of the owners in the Northeast said the same.

For whatever purpose, RV families in all parts of the country do indeed get plenty of use from their vehicles — more use, in fact, than we might have expected considering the timing of our survey. I think this is very clear from our results.

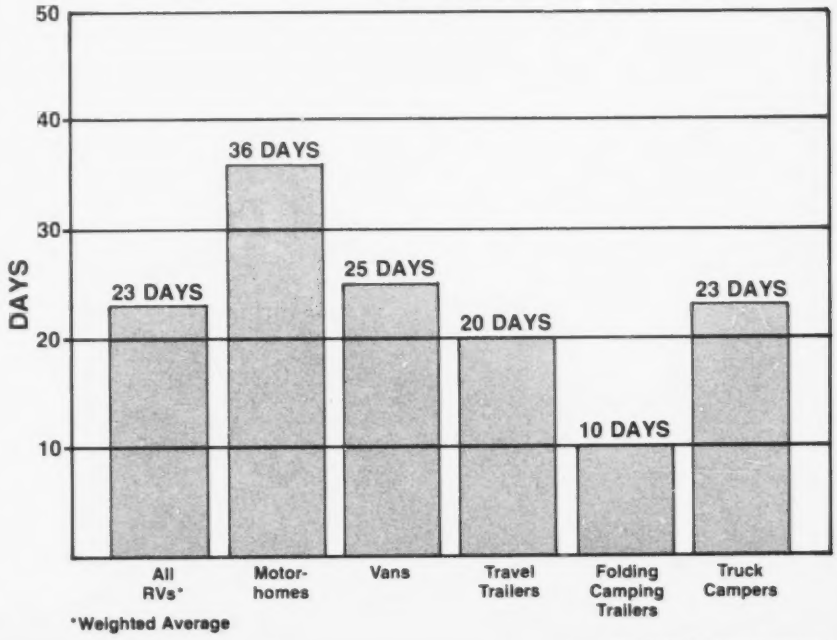
Those not connected with the RV industry, including many government officials who have the power to make laws affecting RV use, don't always realize just how tremendously important a part of their lives RVs are to many Americans.

Consider again: There are more than a million and a half families in this country who spend anywhere from a month to four months of the year with their recreation vehicles. I think that says a lot.

rvd

Next month: A look at replacement demand

Average Number of Days Used
Per Vehicle



*Weighted Average

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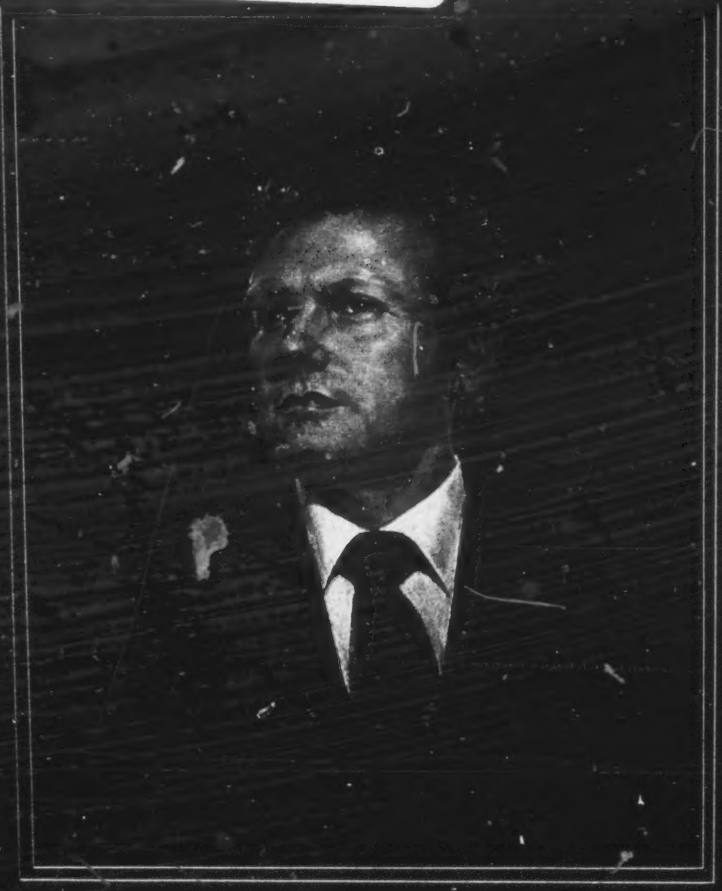

Also this month:
Ronald Reagan On RV Issues
Trailer House Communities Follow TL Article

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ON THE COVER: Renowned artist Nick Volpe's beautiful portrait of our Dealer of the Year — Wolfgang Rippert, Winn's RV center in Ohio — graces this month's cover. Wolfgang was presented the portrait at RVDA's annual meeting in Louisville on December 1. See page 44 for our story on Wolfgang's success.

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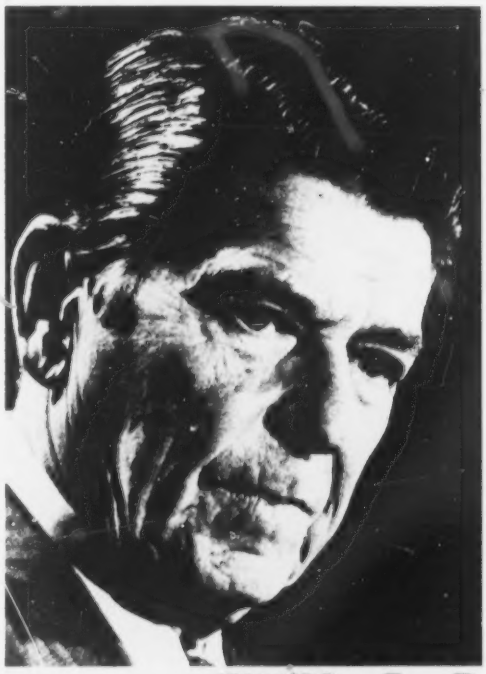

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Dr. Richard T. Curtin

RV owners keep coming back for more

With any consumer product, especially high-ticket items, one of the best ways to measure the success of the product is by its repeat purchasers. If a buyer goes back for more of the same, that usually indicates he's a happy customer. Consumers may buy on a whim or be persuaded by advertising once, but when they purchase an item a second time it's because they've tried it and liked it.

By that important yardstick, the recreation vehicle industry is turning out a highly successful product. Our University of Michigan Survey Research Center team surveyed a scientifically selected sample of the nearly six million RV families in the U.S. and asked them whether they would buy another RV if they decided to replace the one they now own.

Coming at a time when a major gasoline availability problem was making it increasingly harder to justify RV ownership (our survey was taken in 1979), we were somewhat surprised and extremely impressed to hear their response as nearly two-thirds of all RV owners said they would buy another. To state it another way, some 65% of the industry's customers, representing approximately four million families, stepped forward during one of the most troubled times in the industry's history to be counted among those who intend to continue with the life-style.

What's more, though a trend toward less expensive, smaller RVs would seem justified, most of those committed customers told us if they did decide to replace their current RV they would do so with either the same type of vehicle or one of greater value, which often means bigger. Very few motorhome owners, for example, said they would buy anything other than another motorhome.

I would call that kind of response a significant vote of confidence for the RV industry. Not many industries, especially not those who compete for the discretionary dollar, can boast of such commitment on the part of their customers.

Intrigued by this important finding, we decided to take our study one step further in an effort to learn which RV owners are most attached to their vehicles. What we found is that there is solid commitment on the part of owners of every type of RV, but that owners of motorized vehicles seemed to be the most satisfied customers of all.

Some 71% of all the motorhome owners we surveyed said they would buy another RV, and nine out of 10 of those who said *yes* said their next vehicle would be another motorhome.

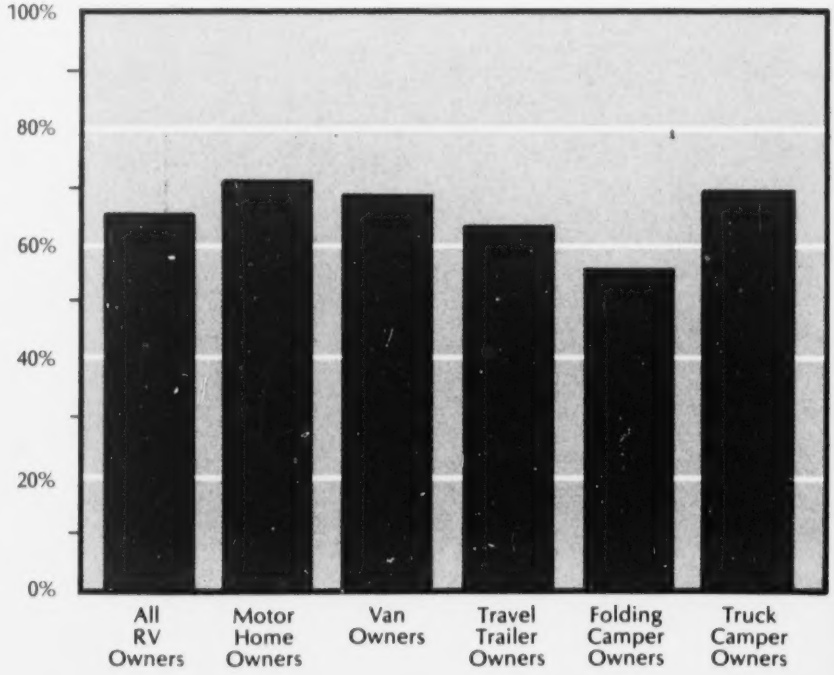
Similarly, a total of 68% of all van owners told us they would enter the market again and three out of four of them said they'd buy another van. Most who would not buy another van would purchase a motorhome.

That's not to say that travel trailer owners are not also pleased with what they own. Some 63% of the travel trailer families (which includes fifth-wheel owners) told us they would replace their unit with another recreation vehicle, with seven out of 10 of them indicating it would be another unit of the same type. Of those who would replace but not with another travel trailer, the predominant number said they would move to a motorhome.

Truck camper owners are committed RVers, too, with 64% indicating they would buy another RV — although in more than half the cases they said they would move on to a different type of recreation vehicle. Most, if they decided to replace, would purchase either a travel trailer or motorhome, with the travel trailer being more likely.

Of the folding camping trailer owners, 56% told our researchers they would

Percentage of Current Owners Who Would Buy Another RV

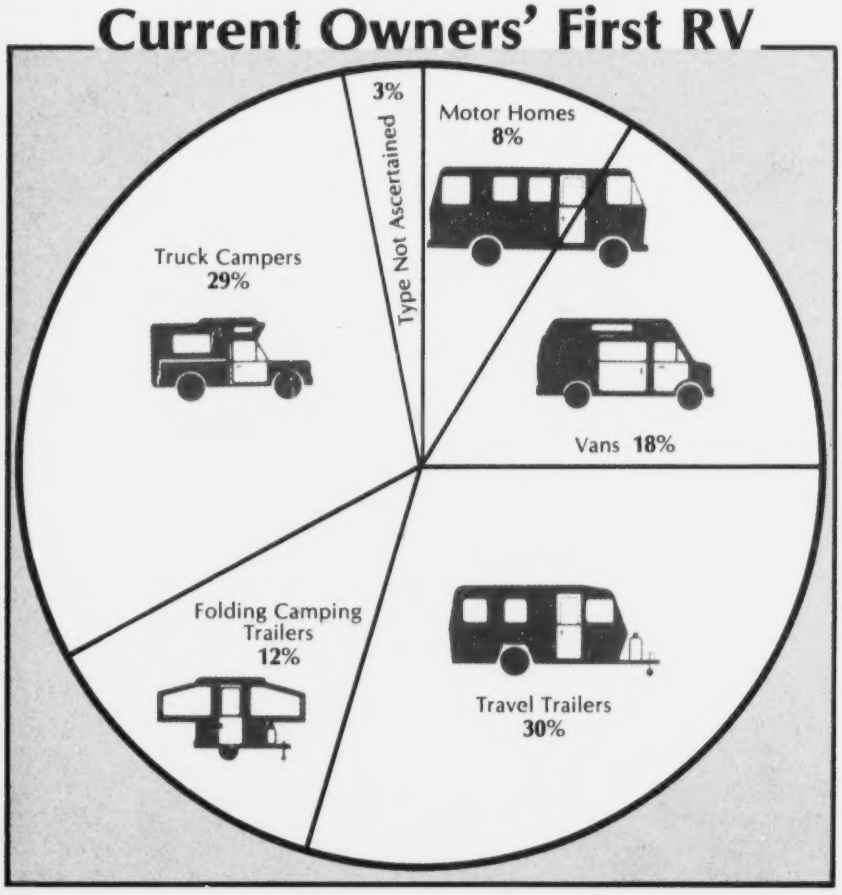


buy another RV, but as with the truck camper people, only half would go for the same type of vehicle. Most of the rest would move up to a travel trailer.

One of the things I find most interesting about all of this is that there is a larger percentage of truck camper owners than folding camping trailer owners who say they will continue as RVers. This indicates that perhaps truck campers are underrated and folding campers a bit overrated as "introductory" vehicles. Granted, that statement probably wouldn't be very fair if it was based solely on the findings I've reported so far.

In another part of our study, however, in which we asked all RV owners to tell us about the first RV they bought, a highly significant 29% said they started out with a truck camper. Only 12% of today's RV families began with a folding camping trailer. As a first vehicle, the truck camper is second only to the travel trailer, and only by the slimmest of margins. The travel trailer was the first RV owned by 30% of today's RV families.

Looking at these numbers from one other perspective, 23% of all motorhome owners and 16% of all travel trailer owners in the United States today began with truck campers, while only four percent of today's motorhome families and three percent of all travel trailer owners began RVing with a folding camping trailer. So, while there is considerable merit to the commonly-accepted theory that RV buyers often enter the market at the lower end of the price scale and work their way up to more expensive units, it's the truck camper more often than the folding camper that attracts the first-time buyer.



What about that first-time buyer? The survey tells us existing owners are good bets to buy again, but how have the nation's economic and energy problems affected the chances of the industry enlarging its market? Is there any interest in RVs among those 64 million American families who are not now involved in the life-style?

Up until recently, it had been hard to tell. But now some extremely positive information about first-time buyers has emerged from our study. For the first time in a long time, there is solid basis for industry optimism.

Part of our original survey in 1979 was a question asking non-RV families whether they might buy or rent a recreation vehicle "sometime in the next 12 months." We asked that for the first time in May 1979 and have asked it again every month since then.

Between May '79 and July '80, the percentage of families who said they probably will buy wavered around one percent, while those who said they planned to rent varied from a high of 17% in September 1979 to a low of less than eight percent in April 1980. Then came our August 1980 finding, which happens to be both the latest information available at this writing and the most encouraging news for the industry to date. In August, the number of non-RVers who told us they plan to buy in the next 12 months jumped to 2.3%, the highest it's been since we began asking the question. For five months prior to August, that figure never rose above one percent.

Rent intentions, likewise, jumped considerably in the month of August, to a second highest-ever 16.4%. Just one month before only 11.2% said they planned to rent.

Both these increases are a clear indicator that many Americans feel the worst of the energy and economic problems are behind us and that things will improve enough in the next year to make RVing more practical.

So all of you in the RV business may raise your glasses high as you salute the coming of the new year. With a vote of confidence from your regular customers and new interest from potential buyers to support your optimism, you have every reason to look forward to 1981. **rvd**

(Next month: The purchase characteristics of RV buyers.)

The Exclusive Monthly
RV Dealer Business Report

How's Business?

Sales volume of individual DAB members	
For month	4 up (24%)
	13 down (76%)
Year to date	2 up (12%)
	15 down (88%)

SALES VOLUME		
For Month	This year $2,856,524	−19%
	Last year $3,516,013	
Year to Date	This year $29,221,167	−35%
	Last year $44,617,485	

TOTAL UNIT SALES		
For Month	This year 319	−14%
	Last year 372	
Year to Date	This year 3,645	−32%
	Last year 5,391	

NEW UNIT SALES		
For Month	This year 183	−16%
	Last year 218	
Year to Date	This year 2,248	−37%
	Last year 3,541	

USED UNIT SALES		
For Month	This year 136	−12%
	Last year 154	
Year to Date	This year 1,397	−24%
	Last year 1,850	

October saw a return to some of the good news we had seen in July and August. What appeared to be a flattening out of the downturn during those months was dispelled by a rather sharp drop in September. Now it looks like dealers will have sales during the winter months that will compare favorably to those of last year. That may not be the most exciting news possible, but it should be some relief to see sharp drops replaced with small drops — along with the possibility of an upturn next spring.

The most encouraging aspect of this month's report is that, with only a few exceptions, figures for the various categories of data presented are considerably better for the month than they are for the year to date. This is a clear indication that things are getting better.

Most Dealer Advisory Board (DAB) members reported sales in October down from those of October '79. However, what is not shown is that many are now getting fairly close to last year's numbers. Also the fact that most have controlled expenses to the point that their profits are quite acceptable. In fact, a few dealers are reporting "best profits ever." Also, some are reporting going for and getting higher grosses than ever before. Things are getting better.

The overall business figures for the month show both dollar and unit sales figures below the figures we've been getting all year. Dollar volume was off only 19% (compared with most months in the 30s) and units were down 14% (compared with 30s for most months for the past year and a half).

As it has been for several months, folding trailers show up better than all other categories in new unit sales figures. The figures for the month are low, but a *plus* 16% is most assuredly a welcome number. Both truck campers and travel trailers showed up comparatively well in new sales. However, both motorhomes and fifth wheels are still well off last year's mark.

Used rigs are moving especially well. In fact, in the two largest categories, motorhomes and travel trailers, more used units were sold than new during the month of October. Many dealers would like to acquire more used than they're getting.

The demand for used rigs is not surprising. High prices for new units and high interest rates have combined to pretty much knock the average income buyer right out of the marketplace for new rigs. The only alternative is used. This is a condition that is not likely to change in the near future.

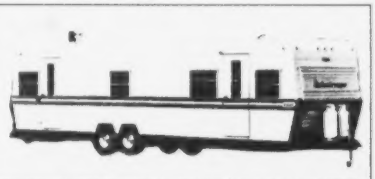
Truck camper sales are better and showing constant improvement for the few dealers who still stock them. From a

Note: Data for this report is provided by RVDealer's own Dealer Advisory Board. This group consists of a wide variety of sizes and types of RV dealerships and represents a cross section of all dealers in the United States.

motorhomes

NEW	For Month	This year 50	−32%
		Last year 73	
	Year to Date	This year 423	−57%
		Last year 987	
USED	For Month	This year 57	−5%
		Last year 60	
	Year to Date	This year 470	−17%
		Last year 564	

travel trailers



NEW	For Month	This year 48	−20%
		Last year 60	
	Year to Date	This year 540	−35%
		Last year 835	
USED	For Month	This year 50	−21%
		Last year 63	
	Year to Date	This year 508	−28%
		Last year 709	

truck campers

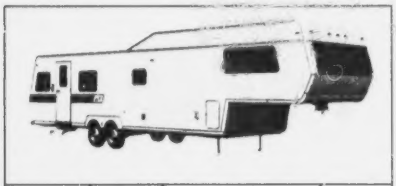
NEW	For Month	This year 17	−11%
		Last year 19	
	Year to Date	This year 200	−46%
		Last year 367	
USED	For Month	This year 11	−21%
		Last year 14	
	Year to Date	This year 150	−40%
		Last year 248	

folding trailers

NEW	For Month	This year 59	+16%
		Last year 51	
	Year to Date	This year 1,021	−19%
		Last year 1,259	
USED	For Month	This year 13	−24%
		Last year 17	
	Year to Date	This year 229	−19%
		Last year 281	

reasonable standpoint, they should do better in the future. Truck sales are good and the owner of a pickup can get into a self-contained RV for a much smaller amount than people who have to buy a tow rig and trailer or a motorhome. A truck camper makes sense. Perhaps dealers need to take a fresh look at this aspect of the RV market.

fifth-wheels



NEW	For Month	This year 9	−40%
		Last year 15	
	Year to Date	This year 64	−31%
		Last year 93	
USED	For Month	This year 5	+100%
		Last year 0	
	Year to Date	This year 40	−17%
		Last year 48	

Fifth-wheel sales were quite sluggish for the DAB members who stock them. The 40% down in new unit sales for the month was the lowest of any type. And the fact that no one sold a used unit completely wrecked the figures for that category. It was reasonable to expect snowbirds to be buying new models for their fall migration, but apparently they didn't. They're a conservative group.

Let's hope the improving news we're getting will get even better. **rvd**

RVIA Shipment Figures

The marketing committee of the Recreation Vehicle Industry Association has announced that the total number of recreational vehicles shipped from manufacturers' plants during September 1980 was 17,500, down 0.6% from September of 1979.

The shipment figures released by the association are contained in a report compiled for the membership by RVIA's marketing committee under the chairmanship of John Agno of the Thetford Corporation.

RV shipments were as follows in September 1980		September 1979	Percent Change	Cumulative 1980	Cumulative 1979	Percent Change
TRAVEL TRAILERS	4,300	4,300	0	34,600	62,600	−44.7%
FIFTH WHEELS	600	1,000	−40%	4,500	12,900	−65.1%
TRUCK CAMPERS	400	600	−33.3%	4,000	11,900	−66.4%
MULTI-USE VEHICLES	7,700	6,500	+18.5%	52,700	88,100	−40.2%
TYPE A: MOTORHOMES	800	1,200	−33.3%	6,700	18,400	−63.6%
TYPE B: VAN CAMPERS	100	100	0	1,800	3,000	−40%
TYPE C: MINI MOTORHOMES	1,700	2,500	−32%	11,900	33,700	−64.7%
FOLDING CAMPING TRAILERS	19,000	14,000	+35.7%	19,000	25,300	−24.9%
TOTALS	17,500	17,600	−0.6%	135,200	255,900	−47.2%

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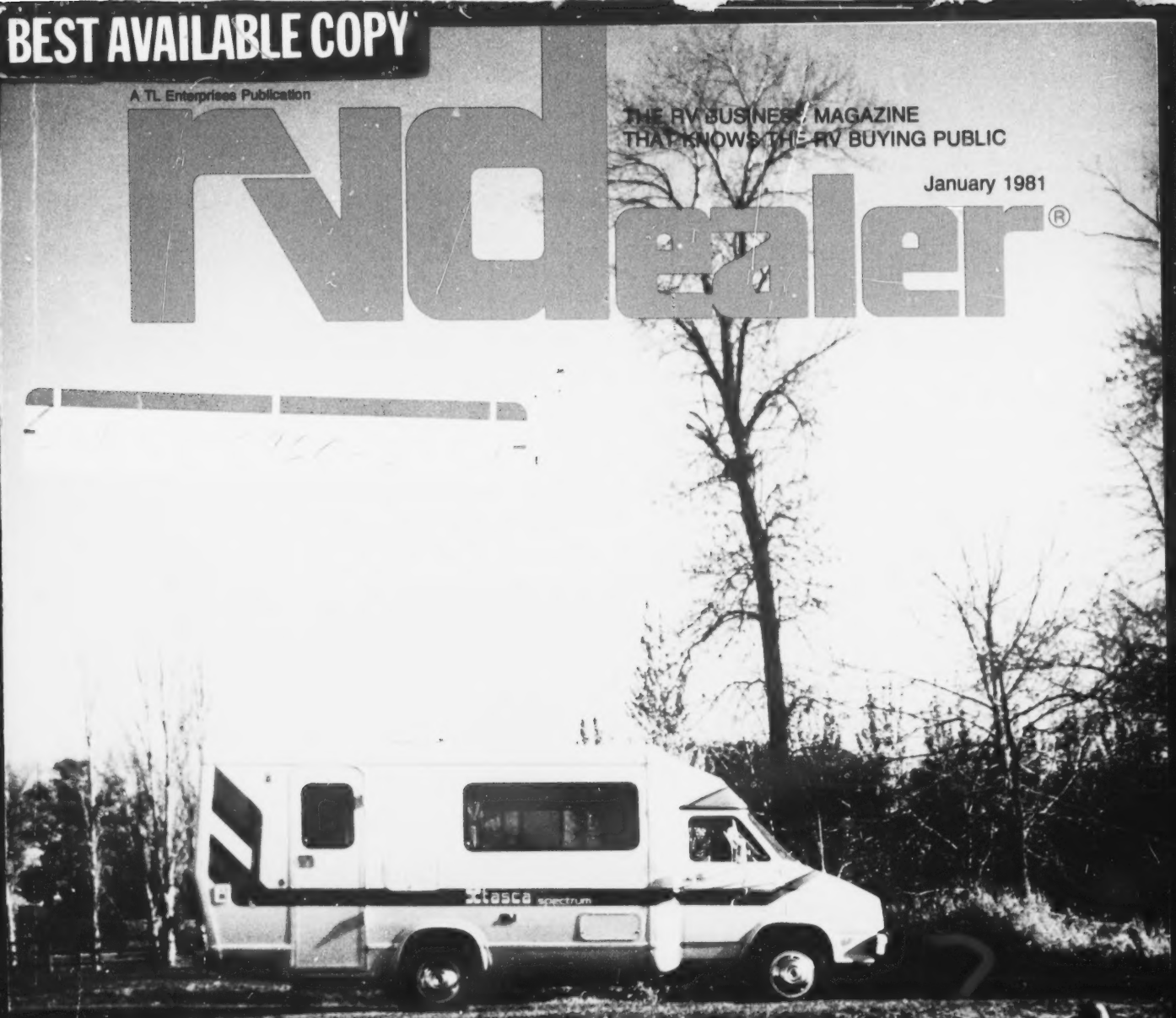
THE RV BUSINESS MAGAZINE
THAT KNOWS THE RV BUYING PUBLIC

January 1981



Winnebago Launches The Warrior/Spectrum

RVD Exclusive:
John K. Hanson On The 'New' Winnebago

Plus:
Mammoth Show Reports on Louisville, Dodger
Is The RV Test Drive A Neglected Sales Tool?

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RVDealer®

THE RV BUSINESS MAGAZINE
THAT KNOWS THE RV BUYING PUBLIC

ON THE COVER: Winnebago's latest offering — the Warrior/Spectrum — was but one of the many new and different products unveiled at Louisville. (See complete wrap-up, beginning on page 44.) For an exclusive interview with chairman John K. Hanson, see page 34, and page 36 for a report on the firm's "revolutionary" unit.

January 1981 Volume 31, Number 10 $1.50 per issue $12 per year

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This is the sixth and final in a series of exclusive articles for RVDealer in which Dr. Richard Curtin analyzes the significant findings of a study recently completed for the Recreational Vehicle Association on the subject of "The RV Consumer: Current Trends and Future Prospects."

Dr. Curtin is director of surveys of consumer attitudes at the Survey Research Center of the University of Michigan; he is regarded as one of the nation's foremost researchers in the area of consumer behavior.

Copies of the complete study are available from RVIA for $2, the cost of postage and handling.

Dr.
Richard T. Curtin

Credit use prevalent in RV purchases

When recreation vehicle shipments dropped off 40% in 1979, it wasn't hard for the industry to explain why. Even part-time observers could understand why sales would slow during a time of limited gasoline availability.

But when RV shipments dipped an additional 40% in 1980, and industry officials explained that it was no longer energy but financing that was hurting business, those of us close to the industry could well understand. But among those casual observers there were some raised eyebrows.

"Could it be that high interest rates have that much of an impact on RV sales?" they asked.

"Why not?" industry officials would answer. "Aren't the housing and automobile industries being hurt the same way?"

"But cars and homes are not discretionary purchases," they often responded. "Don't people usually buy RVs and other discretionary items with cash?"

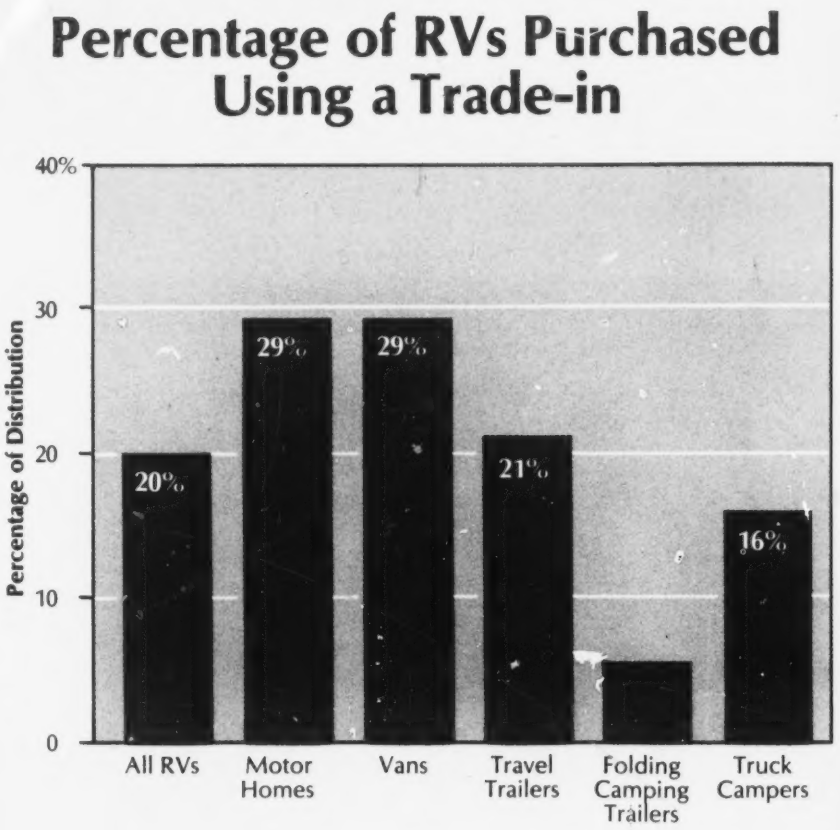
Maybe 20 years ago they did, but not today.

We studied the cash versus credit question at the University of Michigan Survey Research Center as part of our year-long study of the RV consumer. In doing so, our team of researchers interviewed the heads of more than 7,500 American families, of which some 8.3% declared themselves RV owners.

What we learned is that there's quite a bit of validity in what the recreation vehicle industry says about the effect of tight money supplies and high interest rates on its retail market. We found that the availability of credit at what potential customers consider fair and reasonable rates is an important, perhaps even critical, ingredient in a surprisingly high number of retail transactions.

In fact, our study revealed that credit is used in the purchases of more than half of all new RVs sold in this country every year and in the purchases of more then 30% of all used RVs.

There was a time when this wasn't so. Up until recently, perhaps the last 10 or 20 years, our society was conditioned to borrow only when absolutely necessary.



It was okay to go in debt to buy a home, and maybe even a car, but not for luxury items like televisions or RVs. If it wasn't essential, you waited until you had the money before you made the purchase.

Today's society is much different. People now, especially young people, show little hesitancy in borrowing. They do not consider it unwise, as earlier generations seemed to, to go into debt for something they wish to have, even if what they want is not something they absolutely need. As a result, the use of credit is more prevalent today than it has been at any time previously in this country's history.

The fact that this trend toward greater use of credit is led by the young families in our society is obvious from our breakdown of credit purchases by types of vehicles.

For example, we know from earlier parts of our study that vans appeal mostly to young families. More than half of all vans on the road today are owned by people under the age of 34. When we questioned the purchasers of new vans about how they bought their units, a whopping 76% responded that they used credit. In addition, 41% of all used van owners said the same.

Now compare those findings with what we learned about travel trailer owners, who, as a lot, are generally much older. (Two-thirds of all travel trailer owners are over 45.) Our study shows that only 42% of all purchasers of

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new trailers and 31% of all used trailer owners took out a loan when they bought their units.

The difference in price between the two types of units (vans usually sell for more than travel trailers) may be somewhat of a factor, but if so, it's a small factor. That's proven by what we learned from motorhome owners.

Motorhomes, as a whole, are the most expensive type of recreation vehicle on the market. Yet, according to our survey, only 51% of the owners of new and used motorhomes in the country today used credit when they made their purchases. This is not to say that 51% is not a highly significant number. Obviously credit is extremely important in the motorhome market as it is in the RV market as a whole.

But the point being made here is that credit is used most frequently by young families and the fact that motorhome owners use credit less than van owners clearly establishes that point. Remember, like travel trailer owners, two-thirds of all motorhome owners are over the age of 45.

Throughout this report, I've been citing figures related to used purchases as well as new purchases, and I've done so for an important reason.

This study taught us something about the used RV market — namely its size — that can be classified as one of the most significant and surprising results of our work. We learned that an astounding 59% of all RVs owned in this country today were purchased by their owners as used vehicles. In cold numbers, that's roughly 3½ million of the six million units on the road.

With that kind of demand for used products, it's little wonder that RVs hold their value so well. Dealers would do well to emphasize this point to potential customers who have worries about being stuck with "white elephants."

While we were on the subject of credit and purchase tendencies, we asked our interviewees about whether they made trade-ins when they bought their RVs. We learned that trade-ins are used about 20% of the time, and that they're most likely to occur in the purchases of motorized RVs. A total of 29% of all motorhome owners and the same number of van owners reported to us they used a trade-in, while 21% of travel trailer owners, 16% of truck camper owners and only 6% of the folding camping trailers could say the same.

In more than half the cases of motorhome and travel trailer owners who made trade-ins, in more than a third of the cases of van owners who traded, the purchasers traded in the same type of unit they bought.

However, we did learn some things about trade-ins that impressed us.

First, the most common type of vehicle traded in on a van is a car; according to our study, about half of the vehicles traded in on vans each year are automobiles.

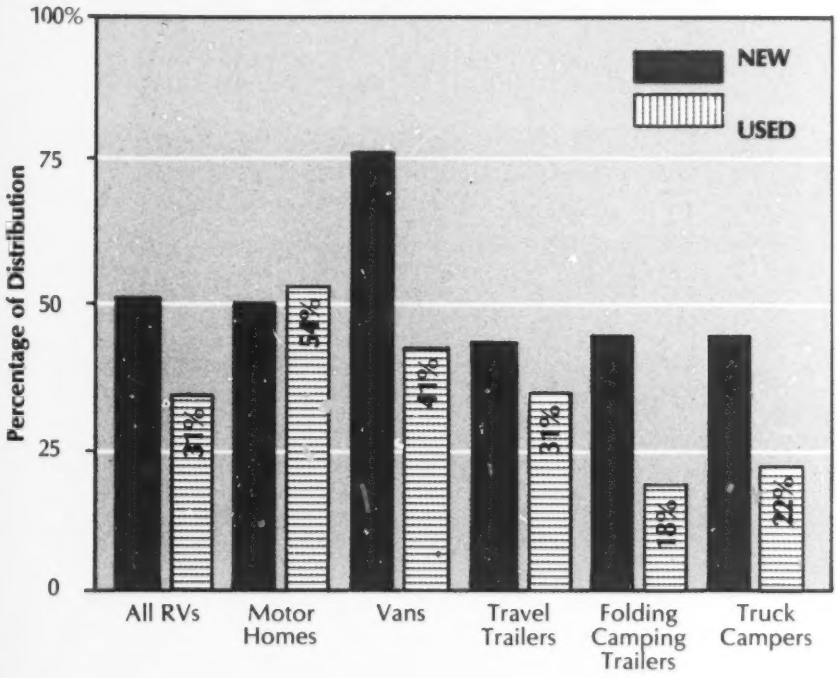
Second, a high number of pickup trucks are traded in on motorhomes, travel trailers and even on vans each year. About a quarter of the vehicles traded in on motorhomes and travel trailers are pickups, and 17% of all units traded on vans are pickups.

If we can assume that many of those pickup owners had added slide-ins and thus turned their vehicles into truck campers, and I believe that's a fair assumption, then we can interpret this finding as further verification of a point we've made previously in this column — truck camper owners often become owners of bigger and more expensive RVs.

Clearly the most important lesson we've learned from this portion of our study, however, is that the availability of credit is essential to the well-being of the industry. With more than half of all buyers of new RVs dependent on credit in order to make their purchases, money supplies are as critical to the industry as fuel supplies, even though to the outside observer that may not seem so obvious.

Since the RV industry, in effect, competes with other industries for money supplies made available by banks, credit unions and other lending institutions, building a strong relationship with the finance community should be a paramount objective for the industry. **rvd**

Percentage of New and Used RVs Purchased with Credit



The Exclusive Monthly
RVDealer Business Report

How's Business?

Sales volume of individual DAB members	
For month	11 up
	7 down
Year to date	1 up
	17 down

SALES VOLUME		
For Month	This year $2,414,043	+3%
	Last year $2,351,815	
Year to Date	This year $30,691,122	−27%
	Last year $41,763,598	

TOTAL UNIT SALES		
For Month	This year 258	+11%
	Last year 233	
Year to Date	This year 3,985	−23%
	Last year 5,174	

NEW UNIT SALES		
For Month	This year 150	+11%
	Last year 135	
Year to Date	This year 2,521	−26%
	Last year 3,419	

USED UNIT SALES		
For Month	This year 108	+9%
	Last year 98	
Year to Date	This year 1,464	−17%
	Last year 1,755	

November shows more promising signs at the retail level than we have seen for a very long time. Certainly there is no boom, but the bust is less threatening than it has been. When we begin to see some of the plus figures in comparison with last year, it at least gives promise.

Eleven of the 18 Dealer Advisory Board (DAB) members were up this November over last year and only seven were down. There hasn't been a figure like that for the DAB since 1978. Although there is some "dumping" to avoid holding inventory over the winter, most dealers still report profits from fair to good. The fact that dealers are able to move units at all is a very good sign that the public hasn't forgotten the pleasures of RVing.

Year-to-date, the picture in terms of sales volume is still grim. Only one dealer is up and the other 11 are down. However, the plus figure for sales volume in November is a welcome sight after almost two years of minuses.

Note: Data for this report is provided by RVDealer's own Dealer Advisory Board. This group consists of a wide variety of sizes and types of RV dealerships and represents a cross section of all dealers in the United States.

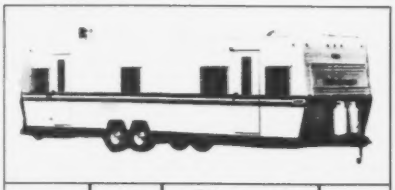
Motorhomes

NEW	For Month	This year 28	−48%
		Last year 54	
	Year to Date	This year 510	−36%
		Last year 796	
USED	For Month	This year 43	+23%
		Last year 35	
	Year to Date	This year 457	+1%
		Last year 454	

Other pluses that give an air of promise to the coming year are in unit sales. The "total unit sales" category for the month shows an increase of 11% over last November. Both new and used units were up about the same percentages. And in two of the five types of new unit categories, sales were up for the month; in used, three were up. It will be interesting to see if this is a trend.

Motorhomes showed up the poorest type in new unit sales for the month. They were down 48% for the DAB, more than the figure for the year-to-date—36%. Used units are moving well, however, and show an increase of 23% for the month and the only plus for any used or new category for the year-to-date. Used motorhomes are selling better than new for the DAB. One might very easily surmise that new motorhome prices make their purchase impossible for the average person; therefore, they're turning to used. Perhaps used units will be at a great premium in the months to come.

Travel trailers



NEW	For Month	This year 52	+42%
		Last year 30	
	Year to Date	This year 594	−28%
		Last year 823	
USED	For Month	This year 48	+2%
		Last year 47	
	Year to Date	This year 579	−23%
		Last year 752	

New travel trailer sales shot up nicely for the month compared to November of '79—up 42%. As with motorhomes, used units are doing extremely well and for the DAB very nearly equal new sales for the year-to-date. No one is setting the world on fire with sales, but 10 of the 15 DAB members who stock travel trailers reported sales up over last November.

Although truck camper sales in the new category were down more than any other RV type for the DAB, the percentage was considerably less than it is for the year-to-date—indicating some pick up in sales. Used unit sales for the month were low, but not bad in terms of percentages compared to last year.

The percentage of increase for new camping trailer sales is fantastic—up

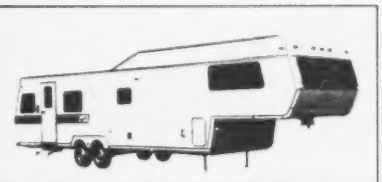
Truck campers

NEW	For Month	This year 16	−24%
		Last year 21	
	Year to Date	This year 241	−43%
		Last year 421	
USED	For Month	This year 6	−14%
		Last year 7	
	Year to Date	This year 134	−36%
		Last year 211	

Folding trailers

NEW	For Month	This year 41	+173%
		Last year 15	
	Year to Date	This year 1,112	−13%
		Last year 1,272	
USED	For Month	This year 9	+125%
		Last year 4	
	Year to Date	This year 355	+11%
		Last year 286	

Fifth wheels



NEW	For Month	This year 13	−13%
		Last year 15	
	Year to Date	This year 64	−40%
		Last year 107	
USED	For Month	This year 2	−60%
		Last year 5	
	Year to Date	This year 39	−25%
		Last year 52	

173%—but the number of unit sales is low, therefore misleading. But 11 of the 15 DAB dealers who stock them were slightly up which indicates that there is an overall increase in sales. Even used sales were up more than double last November's. Year-to-date, new camping trailer sales still look better than those of any other type—down only 13%.

Fifth-wheel sales picked up well in the new category—down only 13% for the month compared to 40% year-to-date.

Judging from what the Dealer Advisory Board shows happening at the retail level and what we learned at Dodger Stadium and Louisville, the only thing standing between relatively good times in the RV industry and total disaster is our country's monetary policy at both the federal and local level. Our fate is in the hands of the bankers. **rvd**

RVIA Shipment Figures

The marketing committee of the Recreation Vehicle Industry Association has announced that the total number of recreational vehicles shipped from manufacturers' plants during October 1980 was 18,200, down 11.2% from October of 1979.

The shipment figures released by the association are contained in a report compiled for the membership by RVIA's marketing committee under the chairmanship of John Agno of the Thetford Corporation.

RV shipments were as follows in October 1980		October 1979	Percent Change	Cumulative 1980	Cumulative 1979	Percent Change
TRAVEL TRAILERS	4,900	5,500	−10.9%	39,600	68,100	−41.9%
FIFTH-WHEELS	700	1,100	−36.4%	5,200	14,000	−62.9%
TRUCK CAMPERS	400	700	−42.9%	4,400	12,600	−65.1%
MULTI-USE VEHICLES	6,800	7,700	−11.7%	59,600	95,800	−37.8%
TYPE A: MOTORHOMES	1,200	1,200	0	7,900	19,600	−59.7%
TYPE B: VAN CAMPERS	300	200	+50%	2,100	3,200	−34.4%
TYPE C: MINI MOTORHOMES	1,800	2,200	−18.2%	13,700	35,900	−61.8%
FOLDING CAMPING TRAILERS	2,100	1,900	+10.5%	21,100	27,200	−22.4%
TOTALS	18,200	20,500	−11.2%	153,600	276,400	−44.4%

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THE RV BUSINESS MAGAZINE
THAT KNOWS THE RV BUYING PUBLIC

February 1981

RVdealer

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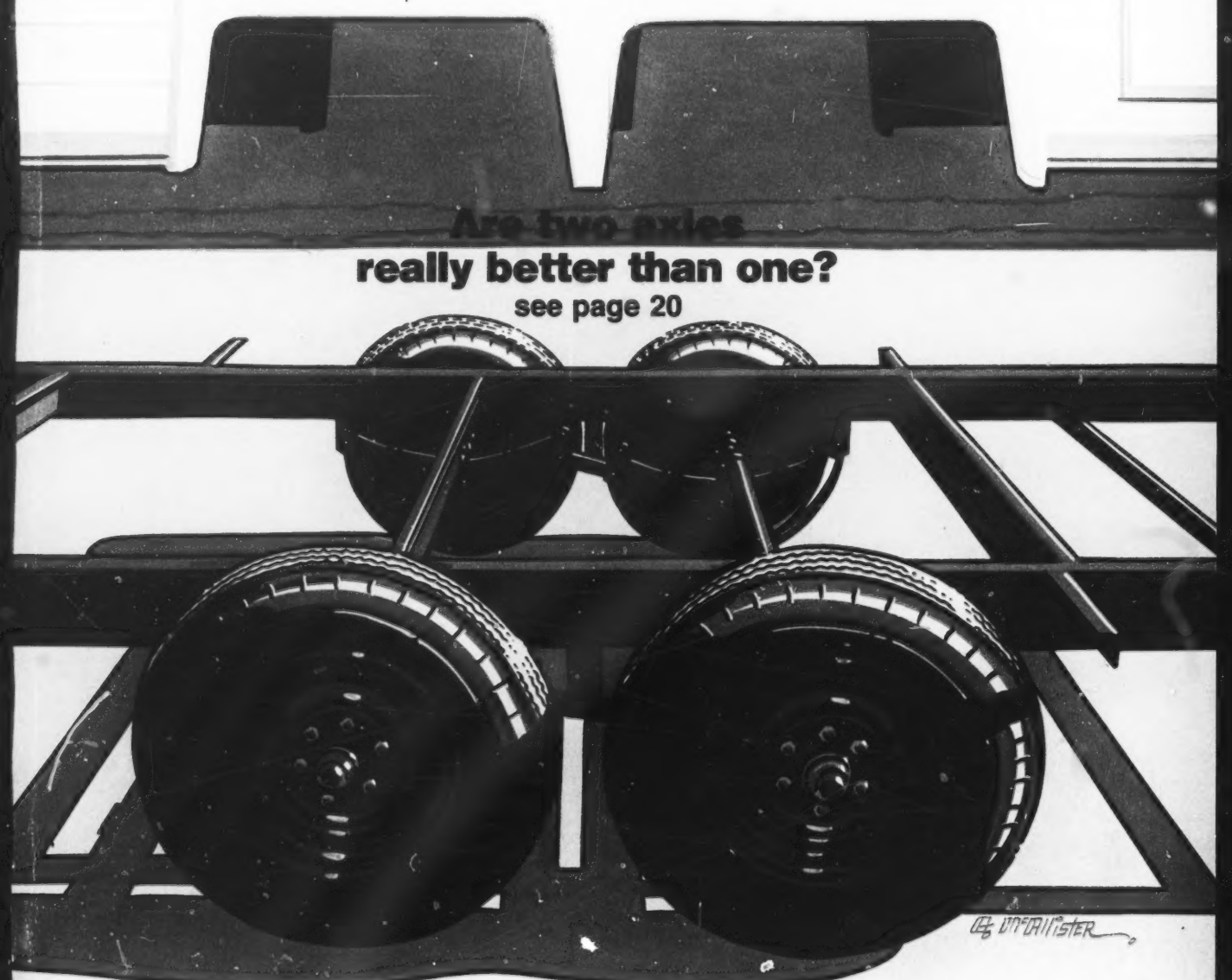

Are two axles really better than one?

see page 20

Dissecting the anatomy of a lawsuit

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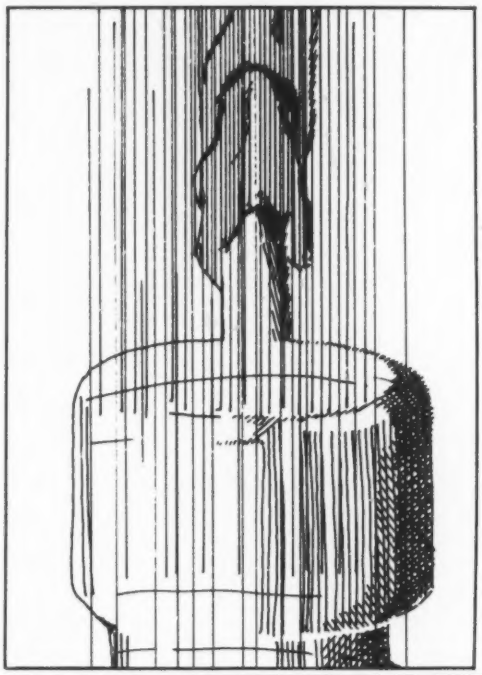
THE RV BUSINESS MAGAZINE
THAT KNOWS THE RV BUYING PUBLIC

ON THE COVER: The tandem axle trailer, as illustrated by artist Gary McAllister, is now a mainstay in the industry. But should it be? And did the industry do *too* fine a selling job on it? Turn to page 20 for our cover report on its ironic sales plight.

February 1981 | Volume 31, Number 11 | $1.50 per issue | $12 per year



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I'VE KEPT CUTTING PRICES TO MEET THE COMPETITION. GOSH, I'VE RECENTLY REDUCED THE PRICE OF OUR TOP-OF-THE LINE 25 FOOTER TO FACTORY COST!

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The Exclusive Monthly
RV Dealer Business Report

How's Business?

December is never a good month for RV dealers, and the one just past is an exception only in that it was slightly better than December of last year in overall volume for *RVDealer*'s Dealer Advisory Board (DAB). The fact that several dealers increased their volume sufficiently to make up for those who were short of last year's figures for the comparable month continues a trend that started some three months ago. Although it's still somewhat premature to proclaim that "good times are just around the corner," all rays of sunlight are welcome.

The total sales volume for December was up nine percent over last year. Six (35%) of the DAB were up and 11 were down. Although far more than one-half of the members were down, the fact that a significant number of dealers are again turning their sales curve up proves that some dealers in some areas are showing that the RV industry is on the march at the retail level. That in itself is a hopeful sign.

On the negative side, it is still disturbing to see that at the end of the second year of the current crunch so many dealers are still showing decreasing sales. In both dollars and units, more dealers are down in December than were up. Nearly all are down for the year. Comparing 1980 and 1979, we see that the DAB is down 19% in total sales volume, down 20% in total units, down 26% in new units, down 10% in used units and 88% of all members down in sales volume on an individual basis. Looking at the year from the standpoint of those statistics does not reflect a very hopeful picture.

But if we look at statistics gleaned from the DAB for hopeful signs, there definitely are some. For example, new motorhome sales were up over last December; camping trailer sales were up both for the month and, by a very small margin, for the year. New fifth-wheel trailers were up for the month, too.

The used sales picture also has some very bright spots. Motorhomes were tied both for the month and for the year. Travel trailers were up for the month. Camping trailers were up both for the month and for the year. Although in some cases these figures are based on very small sales and do not reflect significant changes, others demonstrate clearly that there are upswings in certain areas.

From a profit standpoint, reports this month were varied about as much as they can be. One dealer — a large department store — reports for the fourth consecutive month that his profits are the best ever for that month. Conversely, several others report just the opposite. And, as can be expected in midwinter, very few dealers report good grosses on what they sell. Most are willing to move anything just to get interest payments as low as possible. Somewhat surprisingly, several report poor profits in their parts and accessories departments and in service. Both of those have been doing well all year according to previous reports.

The 42% surge in new motorhome sales is due primarily to a much improved picture for one large motorhome specialist over last December. The overall drop of 34% for the year appears drastic at first glance but when compared to many monthly drops in the high 40s and even the 50s, it isn't all

Sales volume of increase or decrease by individual DAB members	
For month	6 up (35%)
	11 down (65%)
Year to date	2 up (12%)
	15 down (88%)

SALES VOLUME		
For Month	This year $1,913,918	+9%
	Last year $1,763,488	
Year to Date	This year $39,572,504	−19%
	Last year $31,695,293	

TOTAL UNIT SALES		
For Month	This year 212	−5%
	Last year 222	
Year to Date	This year 3,646	−20%
	Last year 4,561	

NEW UNIT SALES		
For Month	This year 140	−8%
	Last year 153	
Year to Date	This year 2,126	−26%
	Last year 2,876	

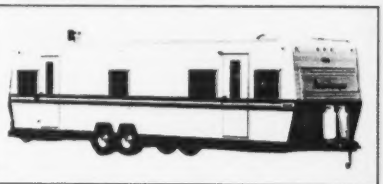
USED UNIT SALES		
For Month	This year 72	+4%
	Last year 69	
Year to Date	This year 1,520	−10%
	Last year 1,685	

Note: Data for this report is provided by RVDealer's own Dealer Advisory Board. This group consists of a wide variety of sizes and types of RV dealerships and represents a cross section of all dealers in the United States.

Motorhomes

NEW	For Month	This year 34	+42%
		Last year 24	
	Year to Date	This year 564	−34%
		Last year 856	
USED	For Month	This year 27	Same
		Last year 27	
	Year to Date	This year 494	Same
		Last year 496	

Travel trailers



NEW	For Month	This year 58	−33%
		Last year 87	
	Year to Date	This year 554	−31%
		Last year 807	
USED	For Month	This year 34	+11%
		Last year 30	
	Year to Date	This year 579	−18%
		Last year 708	

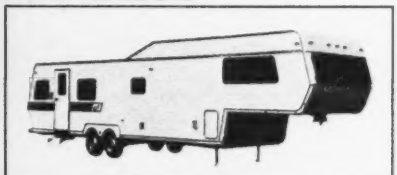
Truck campers

NEW	For Month	This year 14	−33%
		Last year 21	
	Year to Date	This year 241	−42%
		Last year 419	
USED	For Month	This year 3	−33%
		Last year 4	
	Year to Date	This year 138	−40%
		Last year 231	

Folding trailers

NEW	For Month	This year 21	+50%
		Last year 14	
	Year to Date	This year 693	+½%
		Last year 689	
USED	For Month	This year 6	+33%
		Last year 4	
	Year to Date	This year 270	+34%
		Last year 202	

Fifth wheels



NEW	For Month	This year 13	+86%
		Last year 7	
	Year to Date	This year 74	-30%
		Last year 105	
USED	For Month	This year 2	-50%
		Last year 4	
	Year to Date	This year 39	-19%
		Last year 48	

that bad. And the fact that used sales have maintained the same sales pace as they did last year would seem to prove that motorhome buyers are out there, but they're snatching up lower-priced merchandise. The implication would seem to be that it is price — not gasoline or desire — that is keeping them out of the new market.

Camping trailers have been somewhat of a bright spot all year. Sales have not been phenomenal by any means, but with all four categories (*new* and *used*; for *month* and *year-to-date*) on the plus side, it is indeed the most positive aspect of our DAB report for the year. Although some camping trailer dealers on the DAB have not done as well as they did in previous years, several newcomers to that type have done very well. The effect has been to balance out comparative figures for that category.

Since this report concludes a year of reporting the sales picture at the retail level, it is appropriate that a general observation be made of what seems to be the industry's direction at that level.

Our prediction: The coming year will be up from the previous one for approximately two-thirds of today's dealers. They're the ones who are able — for whatever reasons — to make the required effort in their market areas. Part of the business they get will be at the expense of the remaining third who are not able to cope with the realities of the times — again for whatever reasons.

Overall, indications are that 1981 will see a stabilized marketplace, up approximately 15% to 20% over 1980.

RVIA Shipment Figures

The marketing committee of the Recreation Vehicle Industry Association has announced that the total number of recreational vehicles shipped from manufacturers' plants during November 1980 was 13,900, down 5.4% from November of 1979.

The shipment figures released by the association are contained in a report compiled for the membership by RVIA's marketing committee under the chairmanship of John Agno of Stirling Power Systems.

RV shipments were as follows in November 1980		November 1979	Percent Change	Cumulative 1980	Cumulative 1979	Percent Change
TRAVEL TRAILERS	3,300	3,400	-2.9%	42,900	71,500	-40%
FIFTH-WHEELS	600	800	-25%	5,800	14,800	-60.8%
TRUCK CAMPERS	300	600	-50%	4,700	13,200	-64.4%
MULTI-USE VEHICLES	5,700	5,600	+1.8%	65,300	101,400	-35.6%
TYPE A: MOTORHOMES	900	1,000	-10%	8,800	20,600	-57.3%
TYPE B: VAN CAMPERS	100	100	0	2,200	3,300	-33.3%
TYPE C: MINI MOTORHOMES	1,500	1,700	-11.8%	15,200	37,600	-59.6%
FOLDING CAMPING TRAILERS	1,500	1,500	0	22,600	28,700	-21.3%
TOTALS	13,900	14,700	-5.4%	167,500	291,100	-42.5%

A TL Enterprise Publication

RVDealer®

THE RV BUSINESS MAGAZINE
THAT KNOWS THE RV BUYING PUBLIC

March 1981

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Special Section:

Will the rental scene work for you?

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THE RV BUSINESS MAGAZINE
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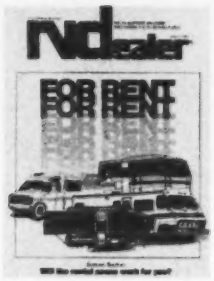

ON THE COVER: The rental scene has more potential and greater profitability than ever. But is it for your dealership? Leading dealers and industry spokesmen tell why — or why not — beginning on page 30 of our special rental section. (Illustration by Mirante Almazan.)

March 1981 | Volume 31, Number 12 | $1.50 per issue | $12 per year

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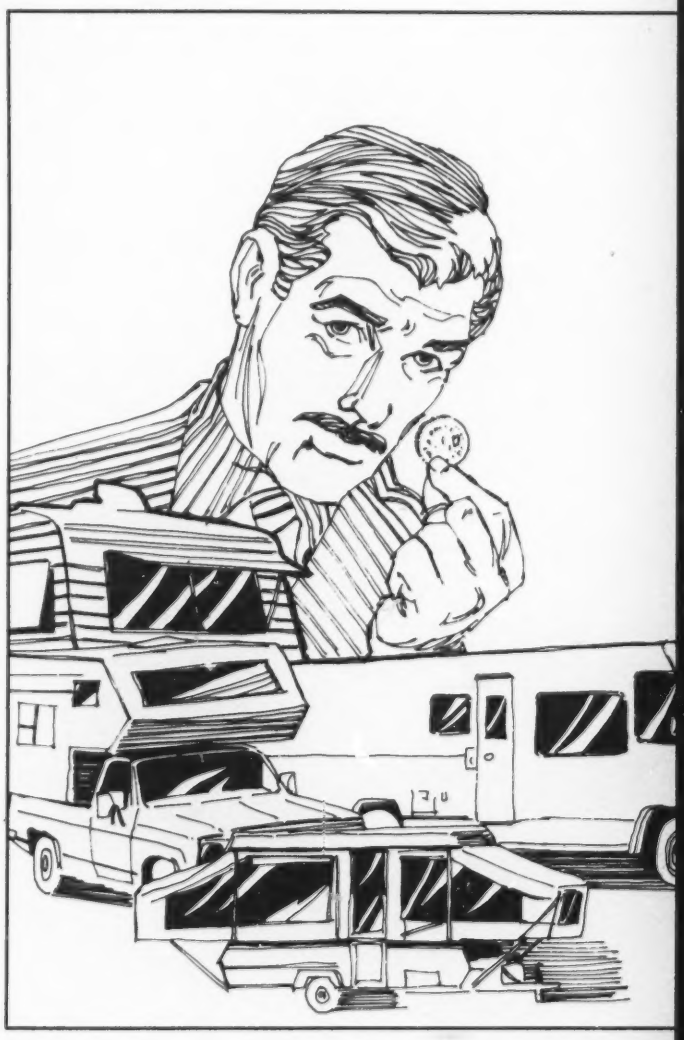

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The Exclusive Monthly
RV Dealer Business Report

How's Business?

January was, in general, a good month for dealers. Not everyone was in the upswing, nor was the sharing of the pie equal. But a trend for the better is clear and dealers who have struggled for two years have reason to believe that 1981 will be looking up.

Figures from our Dealer Advisory Baord (DAB) clearly prove that, compared to last January, the first month of this year indicated a new direction. The combined sales volume of the DAB was *up* 23% from last year. Thirteen of the individual members were *up* and only six *down*.

Of considerable significance is the fact that increases and decreases in sales for the two months being compared are unrelated to dealership size and only slightly to inventory type. The largest dealer on the DAB was up, but so was the smallest. Several medium-sized department stores were up; however, four of the six who were down are in that category. Perhaps this is a reflection of fairly weak sales in travel trailers, an inventory type that department stores rely considerably on.

Sales volume of increase or decrease by individual DAB members	
For month	13 up
	6 down

SALES VOLUME		
For Month	This year $2,948,071	+23%
	Last year $2,396,152	

TOTAL UNIT SALES		
For Month	This year 336	+18%
	Last year 285	

NEW UNIT SALES		
For Month	This year 192	+6%
	Last year 181	

USED UNIT SALES		
For Month	This year 144	+38%
	Last year 104	

Note: Data for this report is provided by RVDealer's own Dealer Advisory Board. This group consists of a wide variety of sizes and types of RV dealerships and represents a cross section of all dealers in the United States.

Motorhomes

NEW	For Month	This year 56	+56%
		Last year 32	
USED	For Month	This year 46	+18%
		Last year 39	

In terms of unit sales, January's report gives reason for optimism. Not only are dealers taking in more dollars, they're moving out more units. That means that more people are becoming involved in RVing or that present owners are trading up. Either way, it's the kind of thing that breathes life into the industry.

One of the few negative factors in January's report is that profits were not as strong as they could have been. There were more reports of good and fair, and some poor, than normally given. There were fewer *excellent* checks. Even in the "Used Units" category and "Service and Accessory" where most dealers have been regularly reporting *good* or *excellent*, there are more *good, fair* and a few *poor* ratings. Perhaps it merely reflects the normal winter doldrums in those areas.

The total sales volume for the DAB was up 23% from last January—$2,948,071 to $2,396,152. Total unit sales were up 18%—from 285 to 336. New units were up six percent—from 181 to 192. Used units were up 38%—from 104 to 144. It would be difficult to dispute the conclusion that things are on the upswing in the light of these figures.

Motorhomes, which have taken it on the chin harder than any other type, showed the strongest gain of anything this month. New unit sales were up a whopping 56%—from 32 to 56. Used units were up a more modest 18%—from 39 to 46. Eight dealers on the DAB reported sales for the month; six were *up* and two were *down*. Both of those who were down showed a decline of only one unit each.

A fact that's worthy of note is that the number of DAB dealers handling motorhomes has declined this year. Not all intend to stay out of them, but for the time being, they're holding back on orders.

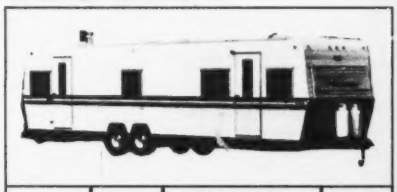
Travel trailers didn't do as well as they did last January. They were down 17% in new units—from 64 to 53. Used units were up 33%—from 42 to 56. Nine DAB members were *up* in the category and seven were *down*.

Pick-up campers were up slightly. The one-unit increase from 16 to 17 is six percent in the new category. Used unit sales shot up 90%—from 10 to 19. Four DAB members report in this category. One was *up* and three were *down*. The largest camper dealer on the board showed a very strong increase—*up* 50%.

Camping trailers also did better this January than last. Of the twelve DAB members who stock them, eight were *up* and four were *down*. New sales were up 13%—from 53 to 60. Used sales were up 88%—from eight to 15.

It is also noteworthy that some dealers who did not stock "rag tops" prior to the latest crunch have gotten into that aspect of the industry and are satisfied with the results they are getting.

Travel trailers



NEW	For Month	This year 53	−17%
		Last year 64	
USED	For Month	This year 56	+33%
		Last year 42	

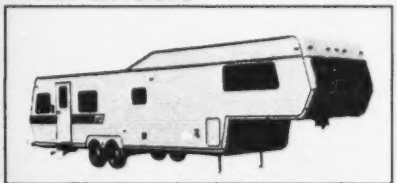
Truck campers

NEW	For Month	This year 17	+6%
		Last year 16	
USED	For Month	This year 19	+90%
		Last year 10	

Folding trailers

NEW	For Month	This year 60	+13%
		Last year 53	
USED	For Month	This year 15	+88%
		Last year 8	

Fifth wheels



NEW	For Month	This year 12	−25%
		Last year 16	
USED	For Month	This year 8	+60%
		Last year 5	

Of course this is only one month's report showing an upswing, but it is a key month. Not only is it traditionally the toughest month of the year, it is the beginning of a new season and is frequently a trend indicator. From what we have seen from the DAB in January, there is reason for a dealer to prepare for better times than he has had in the past two years.

Last year, there were early predictions that availability of products would be the big problem for the summer. As it turned out, that was not really the case.

However, this year, if the January report truly is a trend indicator, products could very well be in short supply by the time the good months get here. Dealers would be wise to project more carefully this year than ever before. Just as it is costly to pay interest on a lot of merchandise that isn't moving, so it is impossible to cash in on profit opportunities if you don't have anything to sell.

Based on the early reports of actual sales so far this year and all the other positive indicators we have seen, it would seem that the average dealer should be preparing for an increase of 20 to 30% over 1980. **rvd**

RVIA Shipment Figures

The marketing committee of the Recreation Vehicle Industry Association has announced that the total number of recreational vehicles shipped from manufacturers' plants during December 1980 was 14,000, down 15.7% from December of 1979.

The shipment figures released by the association are contained in a report compiled for the membership by RVIA's marketing committee under the chairmanship of John Agno of Stirling Power Systems.

RV shipments were as follows in December 1980		December 1979	Percent Change	Cumulative 1980	Cumulative 1979	Percent Change
TRAVEL TRAILERS	2,800	3,200	−12.5%	45,700	74,700	−38.8%
FIFTH-WHEELS	500	700	−28.6%	6,300	15,500	−59.4%
TRUCK CAMPERS	300	600	−50%	5,000	13,800	−63.8%
MULTI-USE VEHICLES	6,100	7,100	−11.6%	70,800	108,500	−32%
TYPE A: MOTORHOMES	1,000	900	−11%	9,800	21,500	−54.4%
TYPE B: VAN CAMPERS	200	100	100%	2,400	3,400	−29.4%
TYPE C: MINI MOTORHOMES	1,200	1,600	−25%	16,400	39,200	−58.2%
FOLDING CAMPING TRAILERS	1,900	2,400	−20.8%	24,500	31,100	−21.2%
TOTALS	14,000	16,600	−15.7%	181,500	307,700	−41%

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The potential rental market is better than ever

The baby-boomers — now at the age when family recreation is important — are ripe for RVing.

Dr. Richard T. Curtin

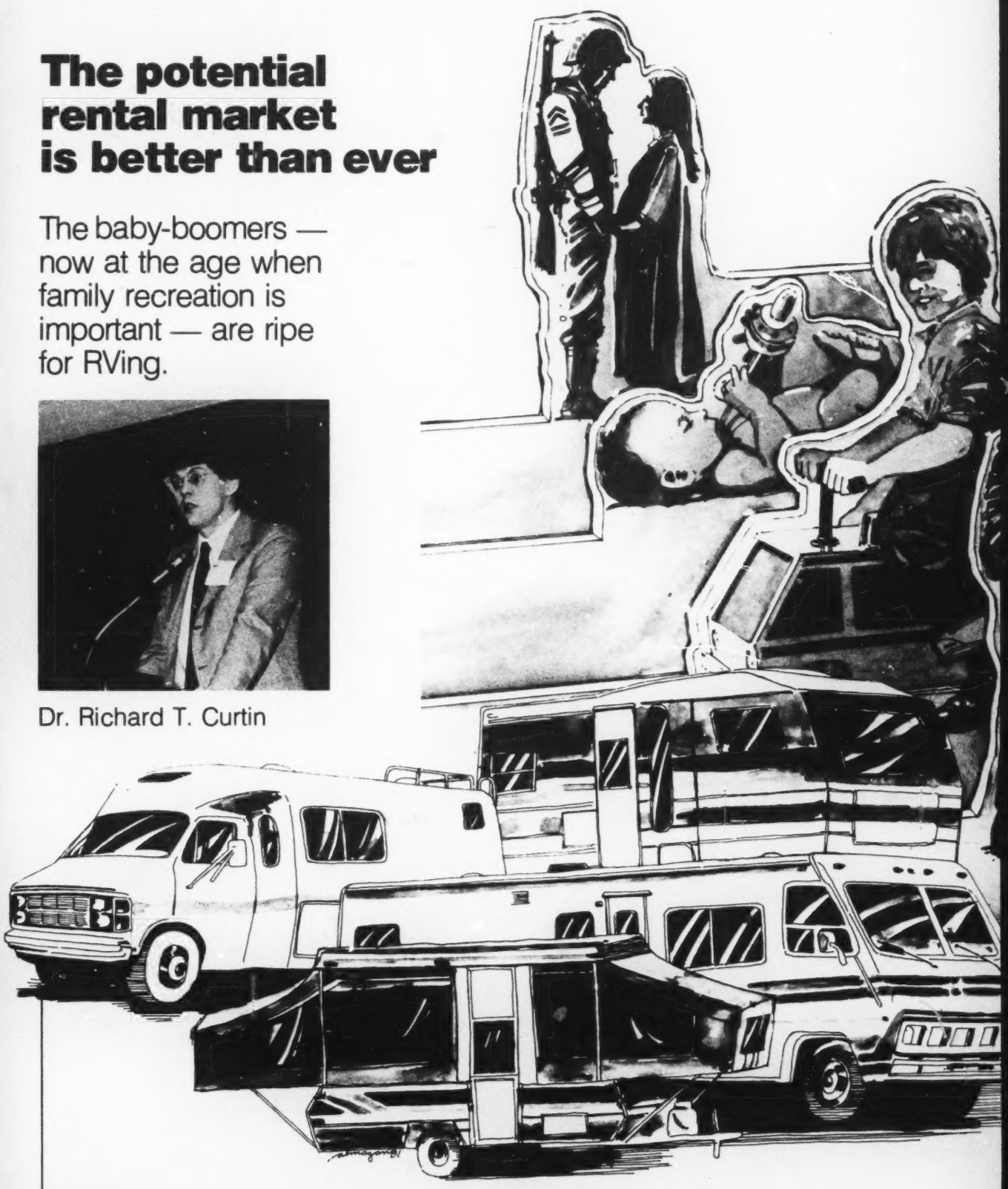


TABLE 1
RV ownership, buying and rental intentions among U.S. households, 1980

	Cases	Percent distributions All Households	Percent distributions All RVs	Proportion of households who: Own RV	Intend to: Buy	Intend to: Rent
All Households*	7,511	100%	100%	8.3%	4.5%	11.0%
Region						
West	1,555	21	34	13.1	6.1	12.8
North Central	2,093	28	26	8.2	3.9	10.6
Northeast	1,437	19	11	4.7	3.1	10.0
South	2,417	32	29	7.4	4.7	10.7
Income						
Less than $10,000	1,302	17	11	4.1	3.0	7.0
$10,000-$14,999	1,151	15	16	7.3	4.1	11.0
$15,000-19,999	1,453	19	23	9.6	4.8	12.3
$20,000-24,999	1,168	16	17	10.6	5.3	12.3
$25,000 and over	2,068	28	33	11.6	5.6	14.0
Age						
Younger than 25	718	10	4	3.1	8.2	16.5
25-34	2,240	30	21	7.4	5.4	15.0
35-44	1,509	20	24	11.7	5.2	15.3
45-54	1,123	15	22	10.3	3.4	8.9
55-64	1,024	14	21	10.2	3.6	8.1
65 or older	833	11	8	4.9	1.2	2.1
Education						
Less than high school	1,228	16	19	8.2	4.7	5.8
High school diploma	2,733	36	45	10.5	6.1	10.3
Some college	1,754	23	20	7.2	5.1	13.3
College degree	1,626	22	16	6.8	2.5	15.0

*Among all vehicle-owning households.

TABLE 2
Reasons for not buying an RV in the next 12 months
(Percent of all families not planning to buy)

Selected reasons	Reasons For Not Buying: Among those who intend to rent	Among those who do not intend to rent
Purchase price	42%	29%
Economy/mileage	24%	15%
Don't want or need, little use	32%	62%

First I would like to relate the potential size and scope of the RV rental market and how that compares with people who would rather buy than rent or who currently own recreational vehicles. Second, I would like to discuss the special circumstances present in our economy today that makes a rental strategy a good long-term plan. These special circumstances, of course, involve the price of energy, down-size tow vehicles and also the changing age distribution of our population. And finally I would like to present the prospects for the RV market, both in the near and the long term.

Part of my strategy is to remind you of the types of people and the sizes of your market in a very precise way so that we can all learn about the RV consumer. For instance, 21% of all households are located in the western region. Although the population of the West only has 21% of all households, they own 34% of all RVs. Similarly, the north central region has 28% of all households and they own 26% of all RVs. You can see that the Northeast has both the fewest number of households, about 20%, and by far the fewest number of RVs, only 11% of the total market

Next 8.3% of all vehicle-owning households currently own a recreational vehicle. We simply asked if they intended to buy a recreational vehicle during the next 12 months. If they said no, they did not want to buy, we asked them if they would be interested in renting a recreational vehicle in the next year. The proportion of households who indicate an interest in the rental market is more than twice the proportion of households who indicate an interest in buying an RV: 4.5% expressed purchase intentions versus 11% who expressed rental intentions. The proportion who own RVs in the South is 7.4%. The Northeast shows 4.7%, almost equal to the South.

You see that most owners live in the West: that both the purchasers (those people who intend to buy) and those who intend to rent are highest in the West. But in the other three regions there are not such significant differences in terms of buying or rental intentions. The RV market, although concentrated in the western region, is fairly evenly spread in the other three geographic regions.

As family incomes increase we see a

rise in ownership, a small although significant rise in the proportion who intend to buy in any one year, and a rather strong rise in those who would like to rent in the next year. I think it should not be surprising to anyone that the best market prospects are the more wealthy families in the United States. In the $25,000 group, rental intentions reached 15%, almost twice the eight percent who own. The most common age group to own recreational vehicles is 35 to 44. Bob Honkey mentioned that the motorhome buyer is likely to be 55 or older and that is quite true. There is a progression: The younger families having the smaller, fold-down camping trailers or vans and the older families having travel trailers and motorhomes. Among the young, many more are interested in the rental market than the purchase market. But by the time they get to age 65 the differences are very close indeed. There is hardly a significant difference there. So the first conclusion about the rental market is that they are, by and large, younger. This is an important fact.

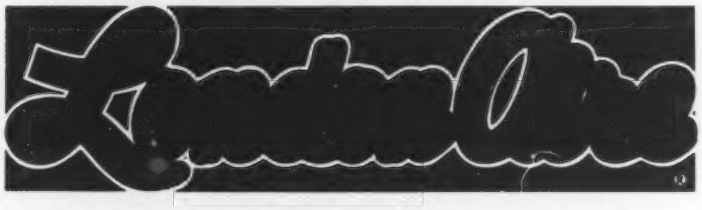
The other thing about the rental market is that it stays rather constant, at about 15%, up to age 44 and then starts falling . . . where the other market has a constant fall throughout. Now let's look at the pattern of ownership, buying and rental intentions among education groups. The ownership rate among high-school educated households is the highest but among those with either more or less education, the difference isn't very great. But look at the difference between buying and renting. As education increases, the proportion of families who have an interest in purchasing an RV falls off, while the proportion of families who report an interest in renting an RV rises dramatically . . . up to 15%.

Why are these rental figures so important? Who are they? Of course we know they are young and they tend to be higher educated than the older population, simply because of change in opportunity, but they are different. Those prospects represent a different market than purchasers. One example is a woman we talked to, about 52, who expressed an intention of renting a recreational vehicle. Our next question was about her camping plans. She said, "Oh my goodness, I'd never go camping." But you intend to rent a recreational vehicle? "Oh surely, I intend to tour, to stay in hotels in major cities and to use the vehicle to tour the United States." Obviously this is someone who doesn't identify with camping at all.

Another example was a younger person, about 32, who expressed rental intention. We asked him what would make him reconsider and purchase a vehicle instead of renting one. He says: "Well, that would make vacations very difficult for me because I fly. I use airplanes and want to rent a vehicle in the West." This person lived in the Northeast and didn't want to drive between the two regions. So the younger, higher-educated market has more diversified interests. I'm not saying they are not interested in camping, but they have many other interests besides and they do not completely identify with the camping lifestyle although they do identify with that type of recreation.

Now about the age cohort: in the 1980s the age group that will be growing the fastest is the leading age of the baby boom generation. They're about 35 now, and in the next 10 years those aged 35 to 44 will be growing very rapidly. Among those aged 35 to 44 is the highest ownership rate. Among those aged 35 to 44 the rental intentions remain high and they have the highest buying intentions. These are all very favorable long-run prospects for rentals.

But let me explore this idea of rental strategy just a little bit more, and offer an explanation why many people are interested in renting rather than purchasing RVs at this time. It has to do with the special circumstances that we find our economy in. Consumers, it was widely believed in 1973, after decades of cheap energy, would not conserve. Many people believed that right through '77 and '78. The fact of the matter is that



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consumers changed very much in response to the auto crisis, and as the prices of energy increased, we've seen people change almost every behavior pattern. Working families changed deeply held social beliefs, moving out of the single family home in the suburbs, moving aggressively into small cars and so on. But the point is very simple: Consumers have tried to adapt to changing circumstances. In the short run, however, there is great uncertainty among consumers. They are not sure what energy prices will do next year, any more than you or I. If prices go up quite a bit, this could be very unfavorable for buyers of a recreational vehicle, a car or a truck with very low miles per gallon.

Also in this new energy era, many recreational vehicles are technologically out of date. It's like the vehicle market when the energy crisis first hit; many people owned large cars that could be replaced by technologically more efficient cars. What consumers do in response to uncertainty is to withdraw from the marketplace, to take no action. The other great uncertainty that's hampering consumer sales in the near term involves high interest rates.

All of these things lead consumers to believe that a purchase decision is less useful for them than a rental decision. This is not to say that they don't intend to purchase in the future, but for the short term, in the midst of the uncertainty of the energy situation, there is more likelihood of a rental decision.

And this is a good short term strategy both for the consumer as well as for the supplier, because as suppliers we all have these same problems. We have the problem of uncertainty of interest rates. Also higher RV costs due to downsizing sometimes present some resistance to consumers. So as a short term strategy, renting can be viewed favorably. But if it was only a short term strategy it might not be worth embarking on that road. If its only benefit was to help sales tomorrow or in the next six months or in the next year, you might judge it's not worth doing.

But as a long term strategy, rental makes sense. Why? First, we had the major baby boom cohort that is coming into the highest buying market. If they are kept out of the market during these next few years, if the people who would otherwise buy are kept away by high interest rates and problems of energy, it's very likely they will never return. Our data suggests people enter the recreational vehicle market at an early age via smaller vehicles and upgrade throughout most of their lives. Very few people we've talked to said they entered the market at age, say, 55. Most entered young and built up the commitment to that lifestyle over their lifetime.

So renting now is advisable as a long term strategy to bring new customers, to bring your traditional market back into the fold during this current time of uncertainty, and then to retain them over their lifetime. And that's an important point because you know those people who are in the highest growing age group, 35 to 44 today, a decade from now will be the same group that is in the highest growing age bracket, 44 to 54, and when they're 55 to 64, they'll still be the fastest growing group in society. When they're 65 and older, they'll still be the fastest growing group in society and they'll dominate the population; they'll be the bulk of the population. The baby boomers will dominate your market until they die. So to miss them coming into the market at this time may cause a less than accurate prospect in the future.

The other point was to retain traditional members of the market. The second point is to bring in new consumers to the RV market through the rental market. Many of the people we've talked to, who expressed rental intentions — a relatively high educated younger age group — often expressed great uncertainty about the product themselves. They've never ridden in an RV; they're seen them but they've never been inside. They don't know if they'll like it or not. There's this initial resistance to entering the market among these groups. In part it's because they want a more diversified leisure time and perhaps don't want to invest as much in one single item. But again, renting helps introduce these people into the market. It gives you a chance to bring them in and keep them as purchasers in the future.

This potential new market is large in size. It's the same baby-boomers, just now beginning the age brackets (35 or older) where family is important, family recreation is important. They've purchased their home if they're going to, they built up their vehicle stocks, their household durables — no doubt with considerable debt, but they are moving through that stage now and they've developed a habit of dual-earner households, which is likely to persist. Although the growth in overall income might be slow in the next five years, the relative availability of disposable income for these types of purchasers is likely to show a modest gain.

So the rental strategy is both to maintain current customers during a period of transition as well as to bring new customers into the market. We will not turn every rental customer into a purchaser in later years, but who could be displeased with one out of three or one out of five or one out of 10 because these people would never have come into the market otherwise. These are therefore net additions to the market.

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To summarize these points into the prospects for the recreational vehicle market, we start out with the long term. The goal for the long-term viability of the RV industry is first to prevent losses of customers due to these transition problems and, second, to bring new customers into the market. Will this work? I think so and I think that the decade of the '80s will be fairly favorable to the recreational vehicle industry. In the shorter run, in the transition, things aren't going to be easy — they'll be difficult. The surveys of consumer attitudes which I conduct produce an index of consumer sentiment which reached its all time low level in May of 1980 and since then has increased by an enormous amount. There was much generation of optimism. Consumers viewed the recession as ending or passed. I think this turn-around sentiment had something to do with the improved sales in the third and fourth quarters of last year.

But by October, while they were saying on the one hand business conditions are likely to improve, they were saying on the other hand interest rates are likely to increase. So that in our last survey in October 1980, two or three respondents expected interest rates to increase in the next six months. And when we asked them how did this affect their purchases or their likely purchase intentions, they told us it will postpone their purchases. In terms of the housing market, nearly 75% of all consumers felt it wasn't a good time to buy houses because of the high interest rates. With regard to vehicles, nearly 30% mentioned high interest rates as reasons for not buying.

I think we're likely to see this year a decline in the interest rates and I would expect renewed strength in the industry by mid-1981 and a slow recovery thereafter — not a sudden burst of new sales but a rather slow recovery.

We will not turn every rental customer into a purchaser, but who could be displeased with one out of three . . . or (even) one out of 10?

And finally what is the likely effect of the new administration on consumer viewpoint? You know whether consumers voted for or against President Reagan, they separate what they expect the economy to do from their preferences for that president. In the October survey we asked people who they expected would win the election and this, of course, was when a landslide was the furthest from any forecaster's mind. In our results 45% expected Reagan to win, 42% expected Carter to win, so in that sense our sample correctly predicted who they expected to win. When we asked those people who expected Reagan to win about their attitudes towards future business conditions, they were much more optimistic by a large factor than those who expected Carter to win. The new president is likely to be greeted with the traditional honeymoon in many ways, one being consumer attitudes. That is, most consumers are expecting improvement in business conditions in this year. (However, this did not extend to interest rates, as I mentioned before.) If I had to tell you one number to follow it is that prime rate. To understand what may happen to your sales this year, if the prime rate goes contrary to most people's expectations and remains high, about 14% in the first quarter, I think this would mean a flat year in sales. If the prime gets as low as 12 or 11%, I think you could increase your sales estimates between 10 and 15%.

To sum up, the rental market presents an opportunity for us today with consumers more willing than usual to enter the RV market and suppliers better able to turn a negative cash flow into a positive one. **rvd**

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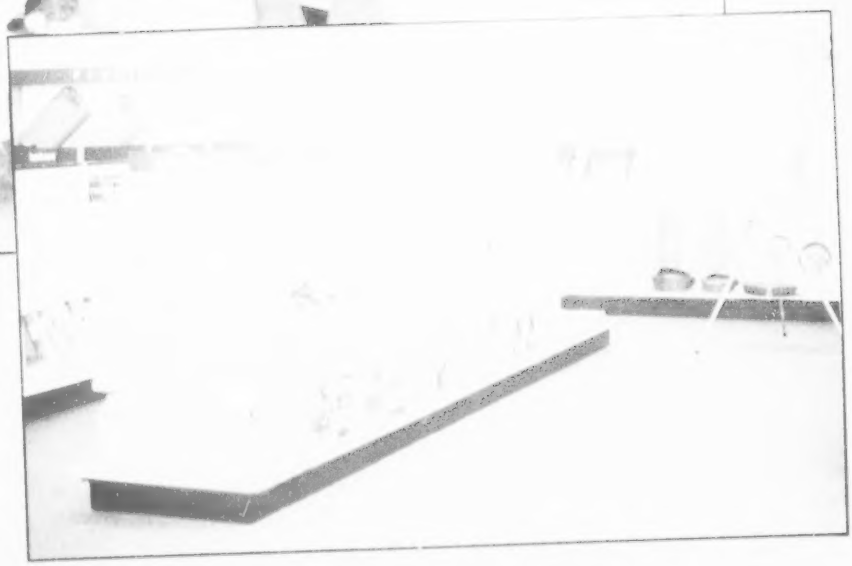
THE RV BUSINESS MAGAZINE
THAT KNOWS THE RV BUYING PUBLIC

April 1981



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RVDealer

THE RV BUSINESS MAGAZINE
THAT KNOWS THE RV BUYING PUBLIC

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Putting it all together

ON THE COVER: Hal Fowler of DTI, a firm that coordinates new RV aftermarket stores, supervises the set-up of Space Age Campers, an RV dealership in Thomasboro, Illinois. Inset photo shows the completed store. (Photos by Snapper Mawby.)

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The Exclusive Monthly
RV Dealer Business Report

Note: Data for this report is provided by RVDealer's own Dealer Advisory Board. This group consists of a wide variety of sizes and types of RV dealerships and represents a cross section of all dealers in the United States.

How's Business?

The upward sales trend that began in January continued into the second month of the year. February reports from Dealer Advisory Board (DAB) members show that most are doing better than they were a year ago, although the upturn is still not universal. There are still many dealers struggling to match last year's numbers.

The combined sales volume for the 21 members of the DAB for the month of February was up eight percent over last year, from $3,188,816 to $3,453,227. Individually, 13 were up and eight were down. No particular size or type of dealership appears to have an edge. Year-to-date, 14 are up and seven down.

SALES VOLUME OF INDIVIDUAL DAB MEMBERS		
For Month	13 up	
	8 down	
Year to Date	14 up	
	7 down	

SALES VOLUME		
For Month	This year $3,453,227	+8%
	Last year $3,188,876	
Year to Date	This year $6,467,444	+15%
	Last year $5,635,476	

TOTAL UNIT SALES		
For Month	This year 418	+6%
	Last year 385	
Year to Date	This year 736	+11%
	Last year 665	

NEW UNIT SALES		
For Month	This year 244	−7%
	Last year 262	
Year to Date	This year 431	−½%
	Last year 433	

USED UNIT SALES		
For Month	This year 174	+41%
	Last year 123	
Year to Date	This year 305	+31%
	Last year 232	

The eight percent sales volume increase in February is a considerable drop from the 23% increase January had. Year-to-date, the average is now 15%.

Total unit sales were up six percent over last February, from 385 to 418. New units dropped seven percent, from 262 to 244; used units were up a whopping 41%, from 123 to 174. Indications are that the used market will be even stronger this year than it has been in the past—with correspondingly good profits.

Year-to-date, total unit sales are up 11%, from 665 to 736. New units are down by 5 percent, from 433 to 431. Used units show an increase of 31%, from 232 to 305.

New motorhome sales were down 17% from last February for the DAB, from 63 to 52. Used units were up 108%, from 25 to 57.

Year-to-date, new motorhome sales are up seven percent, from 95 to 102. Used sales are up 59%, from 63 to 100. It would be interesting to find out where all these used units are coming from, how many are trade-ins, how many are sold directly to dealers and how many are consignment units.

Travel trailer sales weren't strong in February for the DAB, nor have they been so far this year. For the month, new unit sales were down 21%, from 84 to 66. Used sales were up six percent, from 50 to 53.

Year-to-date, new unit sales are down 13%, from 136 to 119. Used sales show an increase of five percent, from 97 to 102. As with motorhomes, used sales are about the same as new, possibly again reflecting the effect of high prices.

In some parts of the country, park model sales are climbing dramatically. Many snowbirds are opting for them, leaving them year-round in parks in the Sun Belt. Conversely, because there's no place to put them, sales are down in other areas.

Although truck camper sales appear to be exceptionally strong in our figures for the month, that is not entirely the case. Sales show an increase of 50% for new units, from 10 to 15. However, four of those sales were by a dealer who did not handle campers last year. Sales figures for this category are quite low, which makes percentages change greatly with even the slightest change in sales. Our problem is that most DAB members have gotten out of the camper business. That does not mean that other dealers aren't picking up some of that business. Our DAB camper specialist actually shows a 26% increase year-to-date.

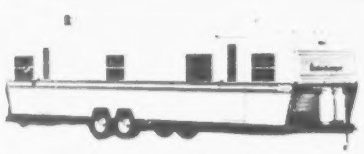
Used camper sales were down 14% in February, from 22 to 19. Year-to-date, used sales are up 10%, from 31 to 34.

Camping trailers seem to be holding their own so far this year. Sales this February are exactly the same as those for the same month last year, 92. Used sales

Motorhomes

NEW	For Month	This year 52	−17%
		Last year 63	
	Year to Date	This year 102	+7%
		Last year 95	
USED	For Month	This year 57	+108%
		Last year 25	
	Year to Date	This year 100	+59%
		Last year 63	

Travel trailers



NEW	For Month	This year 66	−21%
		Last year 84	
	Year to Date	This year 119	−13%
		Last year 136	
USED	For Month	This year 53	+6%
		Last year 50	
	Year to Date	This year 102	+5%
		Last year 97	

Truck campers

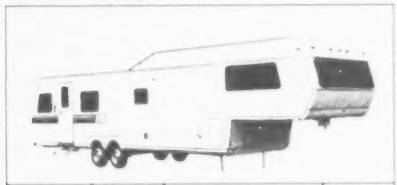
NEW	For Month	This year 15	+50%
		Last year 10	
	Year to Date	This year 28	+17%
		Last year 24	
USED	For Month	This year 19	−14%
		Last year 22	
	Year to Date	This year 34	+10%
		Last year 31	

Camping trailers seem to be holding their own so far this year. Sales this February are exactly the same as those for the same month last year, 92. Used sales

Folding trailers

NEW	For Month	This year 92	Same
		Last year 92	
	Year to Date	This year 151	+1%
		Last year 149	
USED	For Month	This year 34	+79%
		Last year 19	
	Year to Date	This year 51	+70%
		Last year 30	

Fifth wheels



NEW	For Month	This year 19	+46%
		Last year 13	
	Year to Date	This year 31	+6%
		Last year 29	
USED	For Month	This year 11	+57%
		Last year 7	
	Year to Date	This year 18	+64%
		Last year 11	

were up 79%, from 19 to 35.

Year-to-date, new unit sales are up one percent, from 149 to 151. Used sales are up 70%, from 30 to 51.

There has been considerable shifting about among dealers with this RV type. While several dealers have added them, some have dropped or de-emphasized them.

Fifth-wheels did better this month than they did last February. New unit sales were up 46%, from 13 to 19. Our DAB member sold eight during the month. Used units were up 57%, from seven to 11.

Generally, DAB members rated profits in the *good* or *fair* range. Very few rated them *excellent* or *poor*. Service and accessory profits vary a great deal. While some dealers report both areas *excellent*, many others say business has not been very good.

RVIA Shipment Figures

The marketing committee of the Recreation Vehicle Industry Association has announced that the total number of recreational vehicles shipped from manufacturers' plants during January 1981 was 14,900, down 6.3% from January of 1980.

The shipment figures released by the association are contained in a report compiled for the membership by RVIA's marketing committee under the chairmanship of John Agno of Stirling Power Systems.

RV shipments were as follows in January 1981	January 1980	Percent Change	Cumulative 1981	Cumulative 1980	Percent Change
TRAVEL TRAILERS	3,700	5,000	−26%	3,700	5,000	−26%
FIFTH-WHEELS	700	700	—	700	700	—
TRUCK CAMPERS	300	400	−25%	300	400	−25%
MULTI-USE VEHICLES	5,600	5,600	—	5,600	5,600	—
TYPE A: MOTORHOMES	900	800	+12.5%	900	800	+12.5%
TYPE B: VAN CAMPERS	300	100	+200%	300	100	+200%
TYPE C: MINI MOTORHOMES	900	900	—	900	900	—
FOLDING CAMPING TRAILERS	1,800	2,000	−10%	1,800	2,000	−10%
TOTALS	14,900	15,900	−6.3%	14,900	15,900	−6.3%

It's still too early to predict what kind of year it will be. Indications are that it will be better than last, but the two-month report definitely does not show a strong trend for the better. While there is no reason to be pessimistic, it is equally foolish to confuse hopes with realities. The industry has some hopeful things going for it now—good show attendance, lots of people who say they're going to buy, good lot traffic, declining interest rates and fewer competitors. But there are still some formidable obstacles to sales—high prices, negative attitude of bankers, still high interest rates, small cars, and high gasoline prices that are going higher.

We know that the American public wants to own and use our products, but it remains to be seen whether or not it will be able to. **rvd**

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RVDealer®

THE RV BUSINESS MAGAZINE
THAT KNOWS THE RV BUYING PUBLIC

May 1981

5/27/81 C 8950-2

Making points in Washington

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THE RV BUSINESS MAGAZINE
THAT KNOWS THE RV BUYING PUBLIC

ON THE COVER: Through RVDA, RV dealers nationwide scored points on their annual Legislative Conference on Capitol Hill. From left to right are Dave Humphreys of RVIA; Dr. Richard Strombotne of NHTSA; RVDA's Jim Summers with U.S. Representative James Broyhill; Rep. Broyhill; and RVDA President Wayne Peay.

May 1981 | Volume 32, Number 2 | $1.50 per issue | $12 per year

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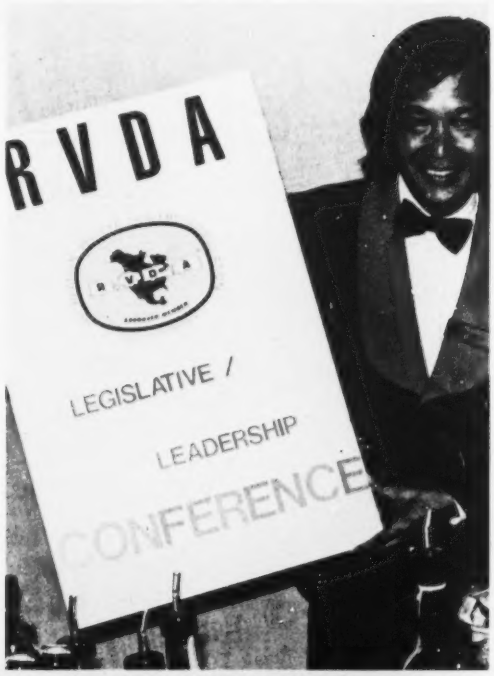

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Bottom Line

Foremost Corporation of America announced the fourth quarter of 1980 ended a year of record profits. Operating income per share increased 26% to $1.16 per share for the fourth quarter ending December 31, 1980. For the year 1980 operating income per share increased 29% to $3.03 per share. The regular quarterly dividend has been increased to 20 cents from 15 cents per share of common stock, up 33%.

Kit Manufacturing Company announced improved results from operations on reduced sales for the first quarter ended January 31, 1981. There was a new profit for the period of $170,000 or 12 cents per share compared to a net loss of $668,000 or 46 cents per share for the same period 1980. A five percent decline in sales for the first quarter compared to first quarter last year was noted.

Elixir Industries announced sharply improved operating results for both its second fiscal quarter and for the six months ended December 27, 1980, in contrast to comparable periods a year ago. For the second fiscal quarter, Elixir had a net income of $385,000 or nine cents per share on sales of $33,706,000, and for the first six months reported a net income of $806,000 or 18 cents per share in sales of $71,180,000. Results for the comparable three- and six-month periods a year ago were losses of 47 cents per share on sales of $32,715,000 for the quarter and losses of 46 cents per share on sales of $70,114,000 for the six months.

Coachmen Industries announced that it experienced operating losses for the second consecutive year. Net sales for 1980 were down 30% from the 1979 figures. A net loss of $7,582,175, or $2.09 per share, was sustained in 1980 compared to a net loss of $10,134,321 and $2.81 per share in 1979. The 1980 results were increased to include sales and losses experienced by C/P Products Corporation, which was merged into Coachmen on a pooling of interest basis in November of 1980.

Winnebago Industries, Incorporated has reported net earnings of $2,340,000 or nine cents per share, for the three months ended November 29, 1980, compared to a net loss of $4,728,000, equal to 19 cents per share, for the same period one year ago.

Included in net earnings for the first three months of fiscal 1981 was a net operating loss carry-over which reduced income taxes by $1,064,000.

RVIA Shipment Figures

The marketing committee of the Recreation Vehicle Industry Association has announced that the total number of recreational vehicles shipped from manufacturers' plants during February 1981 was 17,500, up 12.2% from February of 1980.

The shipment figures released by the association are contained in a report compiled for the membership by RVIA's marketing committee under the chairmanship of John Agno of Stirling Power Systems.

RV shipments were as follows in February 1981		February 1980	Percent Change	Cumulative 1981	Cumulative 1980	Percent Change
TRAVEL TRAILERS	3,500	4,200	– 16.7%	7,700	9,200	– 16.3%
FIFTH-WHEELS	600	500	20%	1,300	1,200	8.3%
TRUCK CAMPERS	300	600	– 50%	600	1,000	– 40%
MULTI-USE VEHICLES	7,500	5,600	– 33.9%	13,100	11,200	17%
TYPE A: MOTORHOMES	1,000	800	25%	1,900	1,600	18.8%
TYPE B: VAN CAMPERS	500	100	400%	800	200	300%
TYPE C: MINI MOTORHOMES	1,500	1,400	7.1%	2,600	2,700	– 3.7%
FOLDING CAMPING TRAILERS	2,600	2,400	8.3%	4,400	4,400	0
TOTALS	17,500	15,600	12.2%	32,400	31,500	2.9%

RVIA shipment figures, for some months, have run alongside our long-running *How's Business?* column . . . but always with figures from RVIA that were one month behind our own reports from dealers. Comparisons were, therefore, difficult. This month we bring you *only* the RVIA shipment figures in order that, beginning next month, RVIA's shipment figures and RVD's figures from dealers can report on sales activity within the same 30-day period.

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THE RV BUSINESS MAGAZINE
THAT KNOWS THE RV BUYING PUBLIC

June 1981

RVs: PART OF THE SPACE AGE

See page 6

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RVDealer

THE RV BUSINESS MAGAZINE
THAT KNOWS THE RV BUYING PUBLIC

ON THE COVER: Two shots from Edwards Air Force Base in April as the space shuttle Columbia landed successfully, generating heat waves on the California desert and waves of applause from literally thousands of RVers. Note the NASA motorhome. Photos copyrighted 1981 by Richard Diaz, James Collison.

June 1981 | Volume 32, Number 3 | $1.50 per issue | $12 per year

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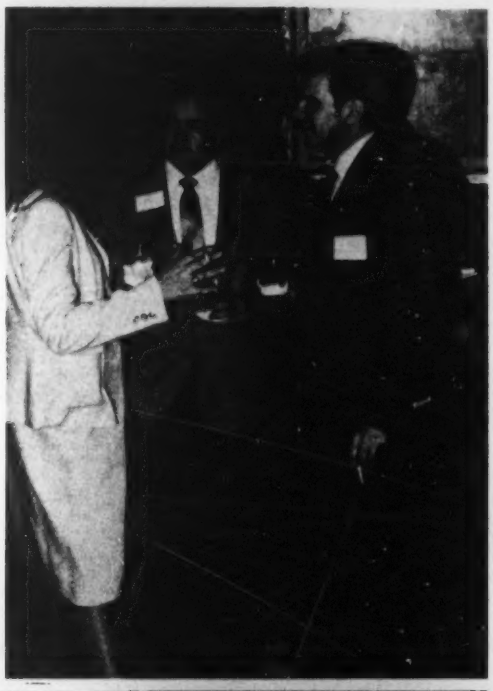

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The Exclusive Monthly
RV Dealer Business Report

How's Business?

March was only a fair month according to our dealer advisory board. That's compared to March of 1980, which rated among the very bad. Sales in the first two months of 1981 indicated that this could be a pretty good year, but the figures for March cast a shadow on those earlier signs. Not that the figures are, comparatively, all that bad. But the general hope was that they would show a stronger up trend than they do. We all keep looking for things to bust loose, but that hasn't happened yet.

Still, we have a lot more *pluses* than we do *minuses*. Most categories that we measure are up. The problem is that they aren't up as much as we had hoped they would be.

SALES VOLUME OF INDIVIDUAL DAB MEMBERS		
For Month	12 up	
	9 down	
Year to Date	13 up	
	8 down	

SALES VOLUME		
For Month	This year $3,527,924	+13%
	Last year $3,120,623	
Year to Date	This year $10,377,360	+19%
	Last year $8,695,159	

TOTAL UNIT SALES		
For Month	This year 493	+14%
	Last year 433	
Year to Date	This year 1,172	+11%
	Last year 1,059	

NEW UNIT SALES		
For Month	This year 296	+2%
	Last year 290	
Year to Date	This year 702	+1%
	Last year 694	

USED UNIT SALES		
For Month	This year 197	+38%
	Last year 143	
Year to Date	This year 470	+28%
	Last year 365	

Sales volume for the 21 members of the dealer advisory board was up 13% over last March, from $3,527,924 to $3,120,623. Individually, 12 member dealers were up and nine were down. Larger dealers appear to be increasing sales more than those who are small to medium in size. Year-to-date, the combined sales volume for the DAB is up 19%, from $10,377,360 to $8,695,159. Thirteen members have sales volumes that are up; eight have volumes that are down.

Motorhomes

NEW	For Month	This year 49	−36%
		Last year 61	
	Year to Date	This year 146	−2%
		Last year 149	
USED	For Month	This year 67	+72%
		Last year 39	
	Year to Date	This year 163	+60%
		Last year 102	

The increase in unit sales closely parallels that of sales volume. Total unit sales were up 14% for the month, from 433 to 493. New units were up two percent, from 290 to 296. Used units jumped 38%, from 143 to 197. The trend for the year-to-date shows March figures to be about par. Unit sales in all categories are about the same for the month and for the YTD.

Following the trend set in the two preceding months, used sales are fantastic. Although all used types are selling well, motorhomes have gone hog-wild. Dealers can't get enough of them and prices are high. But with the astronomical prices of new motorhomes, it's understandable that the used market is so strong.

New motorhome sales were down this March for the DAB. The drop from 61 to 49 is 36%. Used sales were up 72%, from 39 to 67. YTD, new unit sales are down slightly. The drop from 149 to 146 is two percent. But used sales are up 60%, from 102 to 163.

Many DAB dealers who handled motorhomes, particularly minis, in previous years no longer stock them. The business is going more to big dealers who specialize in motorized units. For a dealer selling only two or three a month, it isn't worth it to stock them, according to reports we receive.

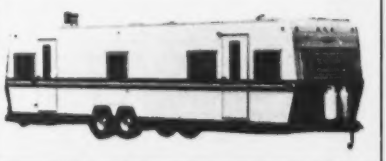
Travel trailer sales in March were up nine percent, from 89 to 97 in the new category. In used, the increase was 13%, from 56 to 63. YTD, new travel trailer sales are down eight percent, from 232 to 213. Used sales are up four percent, from 152 to 158.

New truck camper sales show a dramatic dip in sales for the month—down 40%, from 21 to 15. But, again, as we have reported in the past, we're dealing with small numbers in this category and percentage changes do not necessarily reflect great unit changes. Used campers are still doing well. Sales were up 23%, from 22 to 27 units. YTD, truck camper sales seem to be doing well. New units are up 15%, from 26 to 30. Used units are up 20%, from 45 to 54.

March camping trailer sales show a modest increase. New units are up 11%, from 106 to 118. Used units were up 40%, from 24 to 34.

There has been some change in *who*

Travel trailers



NEW	For Month	This year 97	+9%
		Last year 89	
	Year to Date	This year 213	−8%
		Last year 232	
USED	For Month	This year 63	+13%
		Last year 56	
	Year to Date	This year 158	+4%
		Last year 152	

Truck campers

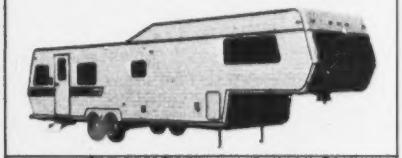
NEW	For Month	This year 15	−40%
		Last year 21	
	Year to Date	This year 30	+15%
		Last year 26	
USED	For Month	This year 27	+23%
		Last year 22	
	Year to Date	This year 54	+20%
		Last year 45	

Note: Data for this report is provided by RVDealer's own Dealer Advisory Board. This group consists of a wide variety of sizes and types of RV dealerships and represents a cross section of all dealers in the United States.

Folding trailers

NEW	For Month	This year 118	+11%
		Last year 106	
	Year to Date	This year 269	+7%
		Last year 252	
USED	For Month	This year 34	+40%
		Last year 24	
	Year to Date	This year 73	+33%
		Last year 55	

Fifth-wheels



NEW	For Month	This year 17	+31%
		Last year 13	
	Year to Date	This year 44	+26%
		Last year 35	
USED	For Month	This year 6	+200 %
		Last year 2	
	Year to Date	This year 22	+100 %
		Last year 11	

is getting camping trailer sales. Formerly, a few large specialists got by far the majority of the sales. Now, that isn't the case. More dealers are stocking them and apparently cutting into the sales of the specialists. But the total sales figure remains relatively strong.

YTD, camping trailer sales show some upturn. New unit sales are up seven percent, from 252 to 269. Used units are up 33%, from 55 to 73.

Fifth-wheel sales in March show a strong percentage increase, but low numbers. New units were up 31%, from 13 to 17. Used units were up 200%, from two to six. Not nearly as many dealers are stocking this RV type as used to. The demand seems to be for the big ones and most dealers are reluctant to invest in the number of units required to have a respectable display. YTD, fifth-wheel sales are up 26% in the new category, from 35 to 44. Used sales are up an even 100%, from 11 to 22. Although it's too early to determine a trend, it appears that an exceptionally high number of fivers are showing up on the used market.

Perhaps one of the problems in comparing figures for the early part of 1981 with those of last year is that the close-out stuff is all gone. A number of dealers made some good manufacturer close-out buys last year and had that merchandise available the first quarter. Even in the worst of times, people will buy if the bargain is good enough. Consequently, a few DAB members had unit numbers last year that reflected a temporary sales situation.

This year, everything is new and high priced. Perhaps it will take some time for the public to get accustomed to them and to realize that we're no longer in a "close-out industry." **rvd**

RVIA Shipment Figures

The marketing committee of the Recreation Vehicle Industry Association has announced that the total number of recreational vehicles shipped from manufacturers' plants during March 1981 was 22,800, up 38.2% from March of 1980.

The shipment figures released by the association are contained in a report compiled for the membership by RVIA's marketing committee under the chairmanship of John Agno of Stirling Power Systems.

RV shipments were as follows in March 1981		March 1980	Percent Change	Cumulative 1981	Cumulative 1980	Percent Change
TRAVEL TRAILERS	5,400	4,300	+25.6%	13,100	13,500	– 3%
FIFTH-WHEELS	800	500	+60%	2,100	1,700	+23.5%
TRUCK CAMPERS	500	600	–16.7%	1,000	1,600	–31.3%
MULTI-USE VEHICLES	8,000	5,800	+37.9%	21,100	17,000	+24.1%
TYPE A: MOTORHOMES	1,500	700	+114.3 %	3,500	2,300	+52.2%
TYPE B: VAN CAMPERS	500	500	0%	1,200	700	+71.4%
TYPE C: MINI MOTORHOMES	1,700	1,200	+41.7%	4,200	3,900	+7.7%
FOLDING CAMPING TRAILERS	4,400	2,900	+51.7%	8,800	7,300	+20.5%
TOTALS	22,800	16,500	+38.2%	55,100	48,000	+14.8%

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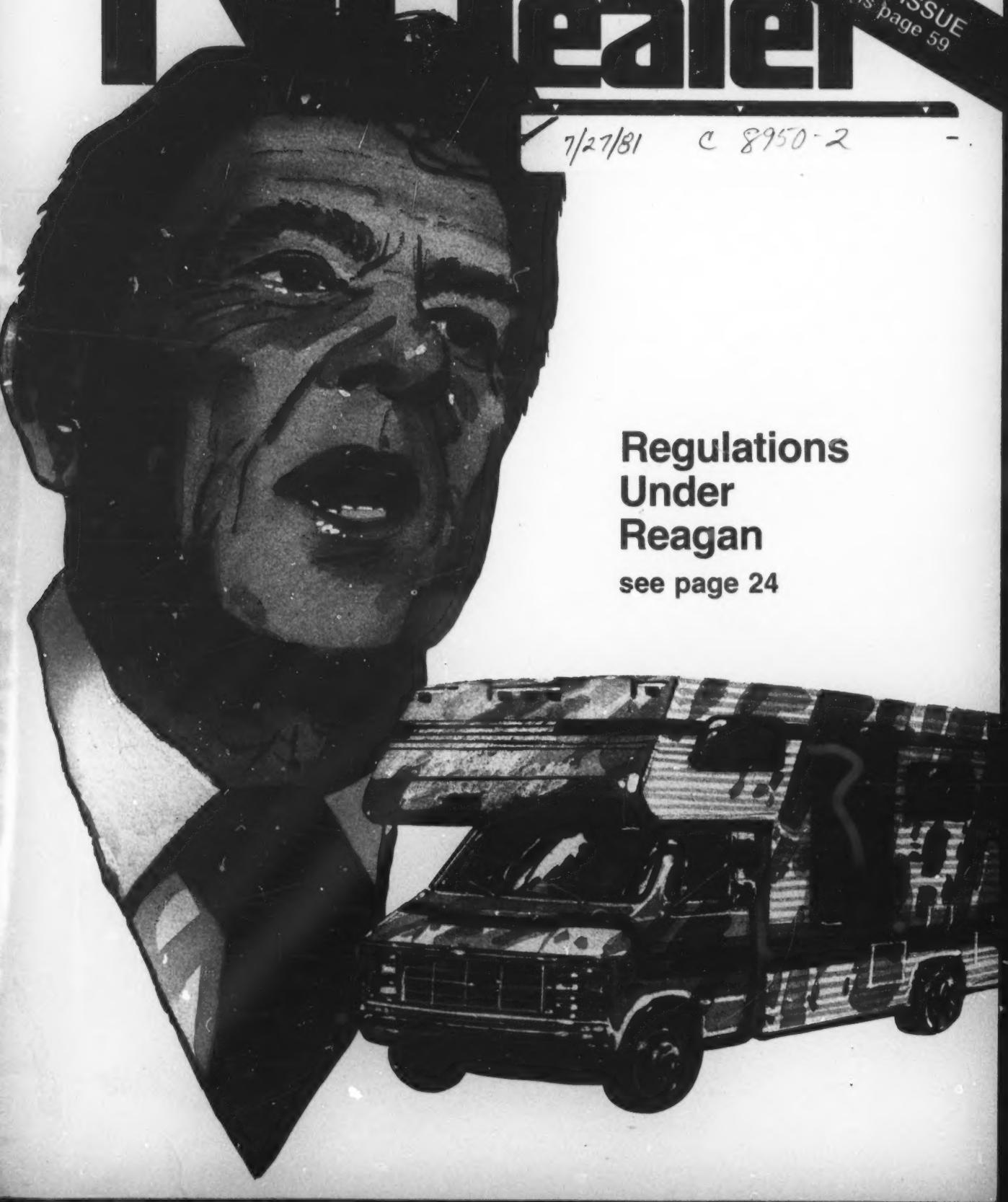
rv dealer

THE RV BUSINES
THAT KNOWS THE R

SOUTH BEND SHOW ISSUE
Special section begins page 59

7/27/81 C 8950-2



Regulations Under Reagan

see page 24

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THE RV BUSINESS MAGAZINE
THAT KNOWS THE RV BUYING PUBLIC

Artist Gary McAllister's illustration of President Reagan graces this month's cover of RVD. For the full story on the effect Reagan's Task Force on Regulatory Relief is having on the RV industry, see page 24.

July 1981 | Volume 32, Number 4 | $1.50 per issue | $12 per year

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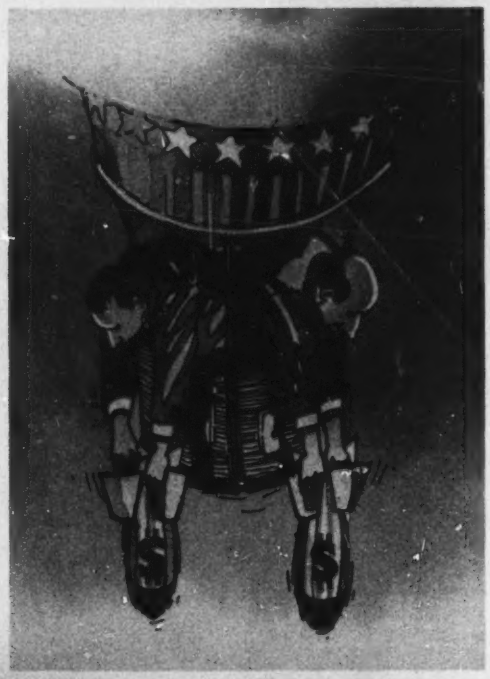

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RV Dealer Business Report

Note: Data for this report is provided by RVDealer's own Dealer Advisory Board. This group consists of a wide variety of sizes and types of RV dealerships and represents a cross section of all dealers in the United States.

How's Business?

April was the healthiest month at the retail level of any month since the latest crunch began in early '79—that is, compared to the same month in the previous year. It would be premature to label the upturn a boom, but a few dealers are setting new profit records. Most are doing the best they have in two and a half years. A few are still not equalling last year's dismal record.

Sixteen of our Dealer Advisory Board (DAB) members are up in sales volume over last April; five are down. Year-to-date, 15 are up and six are down. No particular type or size dealership seems to have the key to success—or failure. It's a mixture at both ends.

SALES VOLUME OF INDIVIDUAL DAB MEMBERS		
For Month	16 up	
	5 down	
Year to Date	15 up	
	6 down	

SALES VOLUME		
For Month	This year $4,585,212	+41%
	Last year $3,261,165	
Year to Date	This year $14,962,155	+25%
	Last year $11,996,322	

TOTAL UNIT SALES		
For Month	This year 574	+21%
	Last year 476	
Year to Date	This year 1,745	+15%
	Last year 1,518	

NEW UNIT SALES		
For Month	This year 346	+16%
	Last year 299	
Year to Date	This year 1,052	+7%
	Last year 984	

USED UNIT SALES		
For Month	This year 228	+29%
	Last year 177	
Year to Date	This year 693	+30%
	Last year 534	

The combined sales volume for the 21 members of the DAB for the month of April was up 41% over last year, from $3,261,165 to $4,585,212. Year-to-date, the increase has been 25%, from $11,996,322 to $14,962,155.

Total unit sales were up 21% for the month, from 476 to 574. New units were up 16%, from 299 to 346. Used units were up 29%, from 177 to 228.

Year-to-date, total unit sales are up 15%, from 1,518 to 1,745. New units are up 7%, from 984 to 1,052. Used units are up 30%, from 534 to 693.

Generally, DAB members report profits ranging from good to excellent. There were very few poors marked for profit ratings. Used units appear to be bringing record grosses—in all types.

Most dealers are scrounging to get used units, particulary consignments. Only one dealer said he is getting all he needs without advertising for them. Motorhomes are particularly in high demand.

New motorhome sales were down 8% from last April, from 61 to 56. Used sales were up 78%, from 46 to 82. Year-to-date, new unit sales were down one-half of 1%, from 204 to 202. Used units were up 65%, from 147 to 242.

Everyone is complaining that the prices of new units are so high and financing is so difficult that most buyers have to turn to used. Although dealers are generally managing to satisfy those customers at this time, one can't help but wonder when the supply of used units will dry up. It can't last forever.

Travel trailers took a strong upswing for the month, up 37%, from 76 to 104 units in the new category. Used units were up 20%, from 71 to 85.

Year-to-date, new travel trailer sales are up 3%, from 310 to 318. Used units are also up 3%, from 225 to 232.

Trailer specialists are having varied results. Some are doing very well whereas a few are doing even worse than they did last year. Since the year has not been very favorable to them so far, the huge upturn in April may indicate a turn-around for this type.

The dramatic turnaround in the truck campers category is due entirely to the sales of our camper specialist on the board. His jump from only seven units last year to 22 this year is impressive.

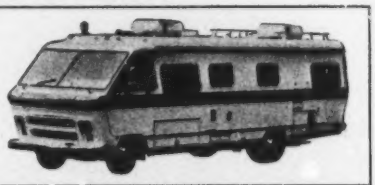
Camper sales for the month were up 133% in the new category, from nine to 21. Used sales were down 9%, from 22 to 20.

Year-to-date, new camper sales are up 59%, from 32 to 51. Used units are up 18%, from 66 to 78.

Our camper specialist rates profits excellent, although there are several poors marked by others.

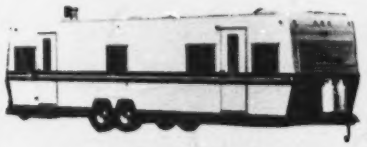
It seems logical that some buyers who want motorhomes will be forced to go the camper route because of high prices on

Motorhomes



NEW	For Month	This year 56	−8%
		Last year 61	
	Year to Date	This year 202	−½ of 1%
		Last year 204	
USED	For Month	This year 82	+78%
		Last year 46	
	Year to Date	This year 242	+65%
		Last year 147	

Travel trailers



NEW	For Month	This year 104	+37%
		Last year 76	
	Year to Date	This year 318	+3%
		Last year 310	
USED	For Month	This year 85	+20%
		Last year 71	
	Year to Date	This year 232	+3%
		Last year 225	

Truck campers

NEW	For Month	This year 21	+133 %
		Last year 9	
	Year to Date	This year 51	+59%
		Last year 32	
USED	For Month	This year 20	−9%
		Last year 22	
	Year to Date	This year 78	+18%
		Last year 66	

RVIA Shipment Figures

The marketing committee of the Recreation Vehicle Industry Association has announced that the total number of recreational vehicles shipped from manufacturers' plants during April 1981 was 25,000, up 74.8% from April of 1980.

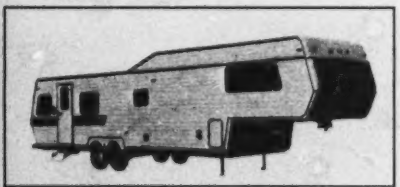
The shipment figures released by the association are contained in a report compiled for the membership by RVIA's marketing committee under the chairmanship of John Agno of Stirling Power Systems.

RV shipments were as follows in April 1981		April 1980	Percent Change	Cumulative 1981	Cumulative 1980	Percent Change
TRAVEL TRAILERS	7,700	4,200	+83.3%	22,900	19,400	+18%
FIFTH-WHEELS	1,000	500	100%	3,100	2,200	+40.9%
TRUCK CAMPERS	500	500	0%	1,600	2,100	−23.8%
MULTI-USE VEHICLES	9,300	5,400	+72.2%	30,400	22,400	+35.7%
TYPE A: MOTORHOMES	1,400	600	+133.3%	4,900	2,900	+69%
TYPE B: VAN CAMPERS	400	200	100%	1,600	900	+77.8%
TYPE C: MINI MOTORHOMES	1,600	1,100	+45.5%	5,800	5,000	+16%
FOLDING CAMPING TRAILERS	4,100	2,300	+78.3%	12,900	9,600	+34.4%
TOTALS	25,000	14,300	+74.8%	80,100	62,300	+28.6%

Folding trailers

NEW	For Month	This year 149	+2%
		Last year 146	
	Year to Date	This year 416	+6%
		Last year 392	
USED	For Month	This year 32	−6%
		Last year 34	
	Year to Date	This year 105	+28%
		Last year 82	

Fifth wheels



NEW	For Month	This year 16	+129 %
		Last year 7	
	Year to Date	This year 65	+41%
		Last year 46	
USED	For Month	This year 9	+125 %
		Last year 4	
	Year to Date	This year 36	+157 %
		Last year 14	

the former. The camper business should definitely take a turn for the better. Dealers who have dropped them might be advised to take another look.

Folding trailers eked up a mere 2% for the month, from 146 to 149 units in the new category. Used units fell 6%, from 34 to 32.

Year-to-date, new units are up 6%, from 392 to 416. Used sales are up 28%, from 82 to 105.

April's results are surprisingly poor for the folding trailers category that should be growing every month. Either dealers or manufacturers—or both—should take a hard look at the product and see just what it is that is holding it back. Properly built and properly marketed, it would have to be a real winner.

The percentages are impressive, but the fifth-wheel unit totals aren't. In April, sales of new units were up 129%, from seven to 16. Used units were up 125%, from four to nine.

Year-to-date, new units are up 41%, from 46 to 65. Used sales are up 157%, from 14 to 36.

Perhaps there will never be big numbers in sales of this RV type, but the dealer who markets them properly will find unusually high grosses are possible.

The figures for April are hopeful signs. The year had not yet shown the signs it should have for a significant upturn, but now it looks more possible. As always, some dealers are making it big and some are still marginal. It definitely is a time to do the job right—or get out. **rvd**

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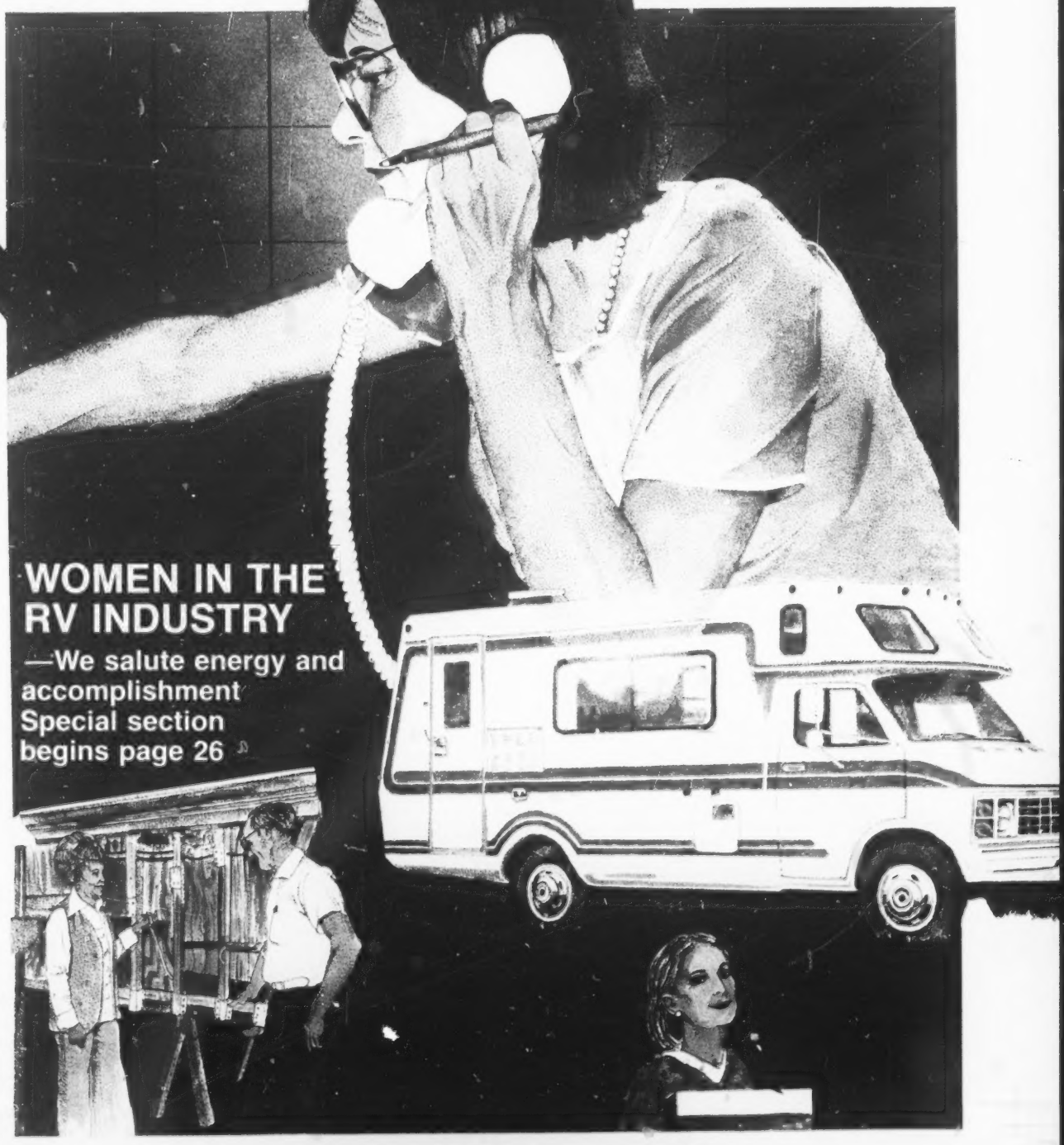
RV Dealer®

THE RV BUSINESS MAGAZINE
THAT KNOWS THE RV BUYING PUBLIC

AUGUST 1981



WOMEN IN THE RV INDUSTRY

—We salute energy and accomplishment
Special section
begins page 26

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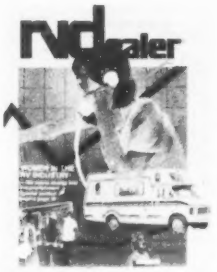

ON THE COVER: The concept and energy of women in today's RV industry have been visualized here by artist Paul Rousso. See RVD's salute to these spirited businesswomen beginning on page 26.

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The Exclusive Monthly
RV Dealer Business Report

How's Business?

SALES VOLUME OF INDIVIDUAL DAB MEMBERS		
For Month	16 up	
	5 down	
Year to Date	17 up	
	4 down	

SALES VOLUME		
For Month	This year $4,964,055	+50%
	Last year $3,317,323	
Year to Date	This year $19,891,941	+30%
	Last year $15,314,191	

TOTAL UNIT SALES		
For Month	This year 615	+25%
	Last year 492	
Year to Date	This year 2,342	+13%
	Last year 2,064	

NEW UNIT SALES		
For Month	This year 380	+22%
	Last year 312	
Year to Date	This year 1,424	+7%
	Last year 1,330	

USED UNIT SALES		
For Month	This year 235	+31%
	Last year 180	
Year to Date	This year 918	+25%
	Last year 734	

May was the best month for RV dealers in a long time. In nearly all categories, compared to the corresponding month a year ago, business is clearly on the upswing. There are a few individual exceptions to the generally bullish trend. New motorhome sales, for example, are down both for the month and for the year. And new travel trailers for the year aren't doing as well as they should.

Note: Data for this report is provided by RVDealer's own Dealer Advisory Board. This group consists of a wide variety of sizes and types of RV dealerships and represents a cross section of all dealers in the United States.

The total sales volume for the 21 members of the Dealer Advisory Board was up 50% for the month. Much of this increase can be directly attributed to the boom in used sales. Unit sales are up substantially, too.

Although a few dealers are getting more used trailers than they really want, the used motorhome market seems insatiable. With new motorhome prices that are unreachable for the average family, there's little reason to think this situation will change. A strong used market will be with us for a long time.

Motorhomes

NEW	For Month	This year 59	−3%
		Last year 61	
	Year to Date	This year 264	−1%
		Last year 267	
USED	For Month	This year 78	+90%
		Last year 41	
	Year to Date	This year 324	+71%
		Last year 189	

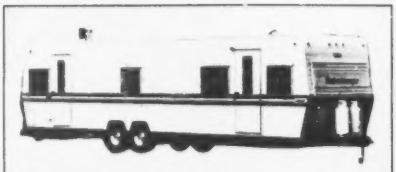
New motorhome sales are about the same as they were last year. That isn't anything to shout about. Sales for the month were down three percent—from 61 to 59. Year-to-date, they're down one percent. Although the drops are not very much, the fact that there is a drop is significant.

Used motorhome sales have gone right off the charts. It's not unusual for the larger motorhome dealers to sell more used units than they do new. A good buying program is crucial.

TRAVEL TRAILERS:

Trailer sales went up nicely in May. Some of the larger department stores or trailer specialists are doing quite well in trailer sales this year. Conversely, some of the smaller dealers don't seem to be getting their share. Perhaps it's a matter of having a larger or smaller inventory for people to choose from. And large inventories require large interest payments. It's a dilemma for the small dealer.

Travel trailers



NEW	For Month	This year 91	+26%
		Last year 72	
	Year to Date	This year 399	+1%
		Last year 395	
USED	For Month	This year 96	+17%
		Last year 82	
	Year to Date	This year 327	+10%
		Last year 298	

Truck campers

NEW	For Month	This year 27	+42%
		Last year 19	
	Year to Date	This year 80	+31%
		Last year 61	
USED	For Month	This year 21	−5%
		Last year 22	
	Year to Date	This year 88	−11%
		Last year 99	

Not many DAB members sell this RV type, but those who do are generally doing well. Used campers don't seem to be doing as well. Our camper specialist on the DAB reports that he can't get enough used even though he keeps an ad in the paper at all times and tries to buy from other dealers (who won't sell). A lot of truck campers are sold privately, which possibly accounts for lower numbers in this category.

With motorhome prices as high as they are, it seems logical that there would be an increase in camper sales to those who want mobility but don't have the money for motorhomes. But the public is not always logical.

FOLDING TRAILERS:

May is usually a strong month for

RVIA Shipment Figures

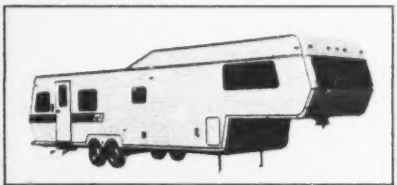
Folding trailers

NEW	For Month	This year 196	+33%
		Last year 147	
	Year to Date	This year 610	+12%
		Last year 547	
USED	For Month	This year 36	+13%
		Last year 32	
	Year to Date	This year 139	+6%
		Last year 131	

camping trailers. This year, new sales were up considerably over May of last year. As with truck campers, a lot of folding trailers are sold by private parties.

It is interesting to note that some of the "old" camping trailer dealers aren't doing so well now, but several department store dealers have picked up quite well in that department.

Fifth-wheels



NEW	For Month	This year 7	−46%
		Last year 13	
	Year to Date	This year 71	+18%
		Last year 60	
USED	For Month	This year 4	+33%
		Last year 3	
	Year to Date	This year 40	+135 %
		Last year 17	

New unit sales for fifth-wheels were way down for May. Used units showed a respectable increase in percentages.

Generally, it looks like a good summer for RV dealers. If banks would only loosen up on credit requirements and interest rates, it would very likely be a boom year. But even as it is, the dealer who stays optimistic and works hard and smart should be able to put away some goodies for the long winter. **rvd**

The marketing committee of the Recreation Vehicle Industry Association has announced that the total number of recreational vehicles shipped from manufacturers' plants during May 1981 was 21,500, up 77.9% from May of 1980.

The shipment figures released by the association are contained in a report compiled for the membership by RVIA's marketing committee under the chairmanship of John Agno of Stirling Power Systems.

RV shipments were as follows in May 1981		May 1980	Percent Change	Cumulative 1981	Cumulative 1980	Percent Change
TRAVEL TRAILERS	5,300	2,900	+82.8%	25,100	20,100	+24.9%
FIFTH-WHEELS	800	400	+100%	3,900	2,600	+50%
TRUCK CAMPERS	500	400	+25%	2,100	2,500	−16%
MULTI-USE VEHICLES	8,100	4,900	+65.3%	38,500	27,300	+41%
TYPE A: MOTORHOMES	1,400	600	+133.3%	6,300	3,500	+80%
TYPE B: VAN CAMPERS	300	300	0%	1,900	1,200	+58.3%
TYPE C: MINI MOTORHOMES	1,500	900	+66.7%	7,300	5,900	+23.7%
FOLDING CAMPING TRAILERS	3,600	1,700	+111.8%	16,500	11,300	+46%
TOTALS	21,500	12,100	+77.9%	101,600	74,400	+36.6%

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RV Dealer®

THE RV BUSINESS MAGAZINE
THAT KNOWS THE RV BUYING PUBLIC

SEPTEMBER 1981

Special Section:

The used RV— Profits not problems

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THE RV BUSINESS MAGAZINE
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Previously owned motorhomes are leading the way for profitability in the resale market. To find out how you can cash in on this segment of the industry, see page 26 for the first of several pertinent articles in this issue. Illustration by Gary McAllister.

September 1981 | Volume 32, Number 6 | $1.50 per issue | $12 per year

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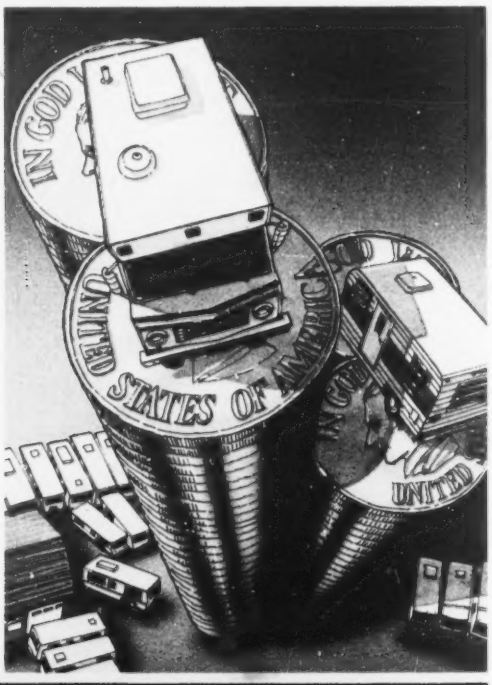

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The Exclusive Monthly
RV Dealer Business Report

Note: Data for this report is provided by RVDealer's own Dealer Advisory Board. This group consists of a wide variety of sizes and types of RV dealerships and represents a cross section of all dealers in the United States.

How's Business?

June saw a continuation of a generally good retail sales picture, but it was far from excellent. Our statistics, derived from the 21 dealers who comprise RVD's Dealer Advisory Board, indicate that May might have been the peak month; June is definitely a bit down. The substantial increase in both dollar volume and unit sales for May fell considerably in June. Still, compared with last June, it looks pretty good.

Perhaps the difficulty we have in coming up with more enthusiasm about today's market picture is that we expect too much. Maybe we're looking for the upturn that happened almost immediately after the crunch in '73 to '74. It isn't happening quite that way now. Quite possibly what we need to do is become adjusted to figures that are representative of a new era in RV sales. Figures that indicate a good but undramatic scene.

Inflation accounts for some of the increase in sales volume figures, but even so, figures for the month and year-to-date are impressive. June's volume for the DAB was up 38% over last year from $3,920,599 to $5,392,570. Individually, 16 members were up and five were down. Year-to-date, the sales increase is 29% from $19,295,897 to $24,813,457. Eighteen DAB dealers are up for the six-month period and only three are down.

Used sales are still very strong and profits are good according to the DAB. There's quite a scramble for used motorhomes on which profits are exceptionally good. New unit sales showed a slight drop fr[om] last June's figure, down two percen[t] Year-to-date, they are up seven perce[nt].

Used unit sales were up 13% for the month and 26% for the year-to-date. Motorhomes are by far the strongest in the used category.

Total unit sales were up slightly for the month—three percent. For the six-month period they are up 14%.

SALES VOLUME OF INDIVIDUAL DAB MEMBERS		
For Month	16 up	
	5 down	
Year to Date	18 up	
	3 down	

SALES VOLUME		
For Month	This year $5,392,570	+38%
	Last year $3,920,599	
Year to Date	This year $24,813,457	+29%
	Last year $19,295,897	

TOTAL UNIT SALES		
For Month	This year 614	+3%
	Last year 595	
Year to Date	This year 2,960	+14%
	Last year 2,599	

NEW UNIT SALES		
For Month	This year 383	−2%
	Last year 391	
Year to Date	This year 1,795	+7%
	Last year 1,671	

USED UNIT SALES		
For Month	This year 231	+13%
	Last year 204	
Year to Date	This year 1,165	+26%
	Last year 928	

Motorhomes

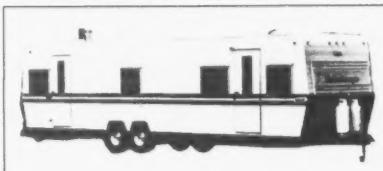
NEW	For Month	This year 58	−24%
		Last year 76	
	Year to Date	This year 312	−9%
		Last year 343	
USED	For Month	This year 68	+48%
		Last year 46	
	Year to Date	This year 392	+67%
		Last year 235	

New motorhome sales are off. There was a drop of 24% from June of last year, down from 76 to 58. Used sales continue to be good, however. Used sales were up 48% from 46 to 68. Year-to-date, new unit sales are down nine percent from 343 to 312. Used sales are up 67% from 235 to 392.

Used motorhome sales now exceed new sales. With prices that put new motorhomes out of reach for most people, one can assume that used sales will continue to be good. Dealers who are aggressive in buying used rigs are doing exceptionally well in profits.

Although this brisk business in used motorhomes is a life saver at this time, one cannot help but wonder how long it can keep up. There aren't enough used rigs in existence to carry the market indefinitely. With so few new ones being sold, and those that are going for very high prices, what happens three years from now?

Travel trailers



NEW	For Month	This year 108	+9%
		Last year 99	
	Year to Date	This year 507	+14%
		Last year 445	
USED	For Month	This year 93	+11%
		Last year 84	
	Year to Date	This year 420	+10%
		Last year 382	

New travel trailer sales are running ahead of last year's pace. In June, sales were up nine percent over last year from 99 units to 108. Year-to-date, sales are up 14% from 445 to 507. Used trailers are still moving well. Unit sales were up eleven percent over last June from 84 to 93. YTD, sales are up 10% from 382 to 420.

It seems likely that travel trailer sales will pick up. Families that would prefer a motorhome but can't afford it may have to turn to trailers to get the space and convenience they want because they can afford the trailer.

Truck campers

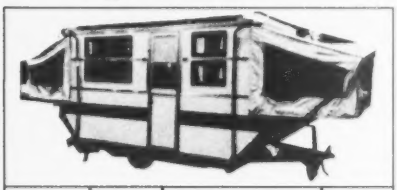
NEW	For Month	This year 15	−17%
		Last year 18	
	Year to Date	This year 93	+16%
		Last year 80	
USED	For Month	This year 20	−31%
		Last year 29	
	Year to Date	This year 120	+2%
		Last year 118	

New unit sales dropped 17% for the

month from 18 to 15. Used sales were down 31% from 29 to 20. YTD, new unit sales are up 16% from 80 to 93. Used units are up two percent from 118 to 120.

With the number of pick-ups in existence and the continued good sales, it is reasonable to believe that more campers could be sold than are. Perhaps dealers aren't trying hard enough.

Folding trailers



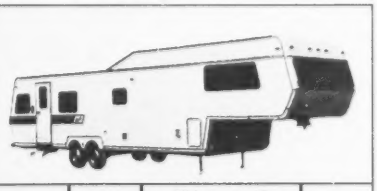
NEW	For Month	This year 187	−2%
		Last year 191	
	Year to Date	This year 797	+8%
		Last year 738	
USED	For Month	This year 45	+22%
		Last year 37	
	Year to Date	This year 184	+10%
		Last year 168	

New unit sales were disappointing for June. They dropped two percent from 191 to 187. It isn't much of a drop, but the fact that there is any at all is discouraging. YTD, sales are up eight percent from 738 to 797.

Used sales were up 22% from 37 to 45. YTD, they are up 10% from 168 to 184.

Two department store dealers on the DAB report unusually good sales of fold-downs this year.

Fifth-wheels



NEW	For Month	This year 15	+114%
		Last year 7	
	Year to Date	This year 86	+32%
		Last year 65	
USED	For Month	This year 5	−38%
		Last year 8	
	Year to Date	This year 49	+96%
		Last year 25	

RVIA Shipment Figures

The marketing committee of the Recreation Vehicle Industry Association has announced that the total number of recreational vehicles shipped from manufacturers' plants during June 1981 was 22,000, up 64.2% from June of 1980.

The shipment figures released by the association are contained in a report compiled for the membership by RVIA's marketing committee under the chairmanship of John Agno of Stirling Power Systems.

RV shipments were as follows in June 1981	June 1980	Percent Change	Cumulative 1981	Cumulative 1980	Percent Change
TRAVEL TRAILERS	5,200	3,100	+67.7%	30,300	23,200	+30.6%
FIFTH-WHEELS	900	400	+125%	4,800	3,000	+60%
TRUCK CAMPERS	600	400	+50%	2,700	2,900	−6.9%
MULTI-USE VEHICLES	8,000	5,000	+60%	46,500	32,300	+44%
TYPE A: MOTORHOMES	1,200	700	+71.4%	7,500	4,200	+78.6%
TYPE B: VAN CAMPERS	300	300	0%	2,200	1,500	+46.7%
TYPE C: MINI MOTORHOMES	1,700	1,300	+30.8%	9,000	7,200	+25%
FOLDING CAMPING TRAILERS	4,100	2,200	+86.4%	20,600	13,500	+52.6%
TOTALS	22,000	13,400	+64.2%	123,600	87,800	+40.8%

The percentage increase for new fiver sales in June is impressive, but the number of units involved is small. The increase of 114% is a unit increase from seven to 15. Used unit sales dropped 38% from eight to five. YTD, new unit sales are up 32% from 65 to 86. Used units are up 96% from 25 to 49. Unfortunately, the small numbers involved here tend to distort the picture. However, fifth-wheels sales seem to be picking up quite well.

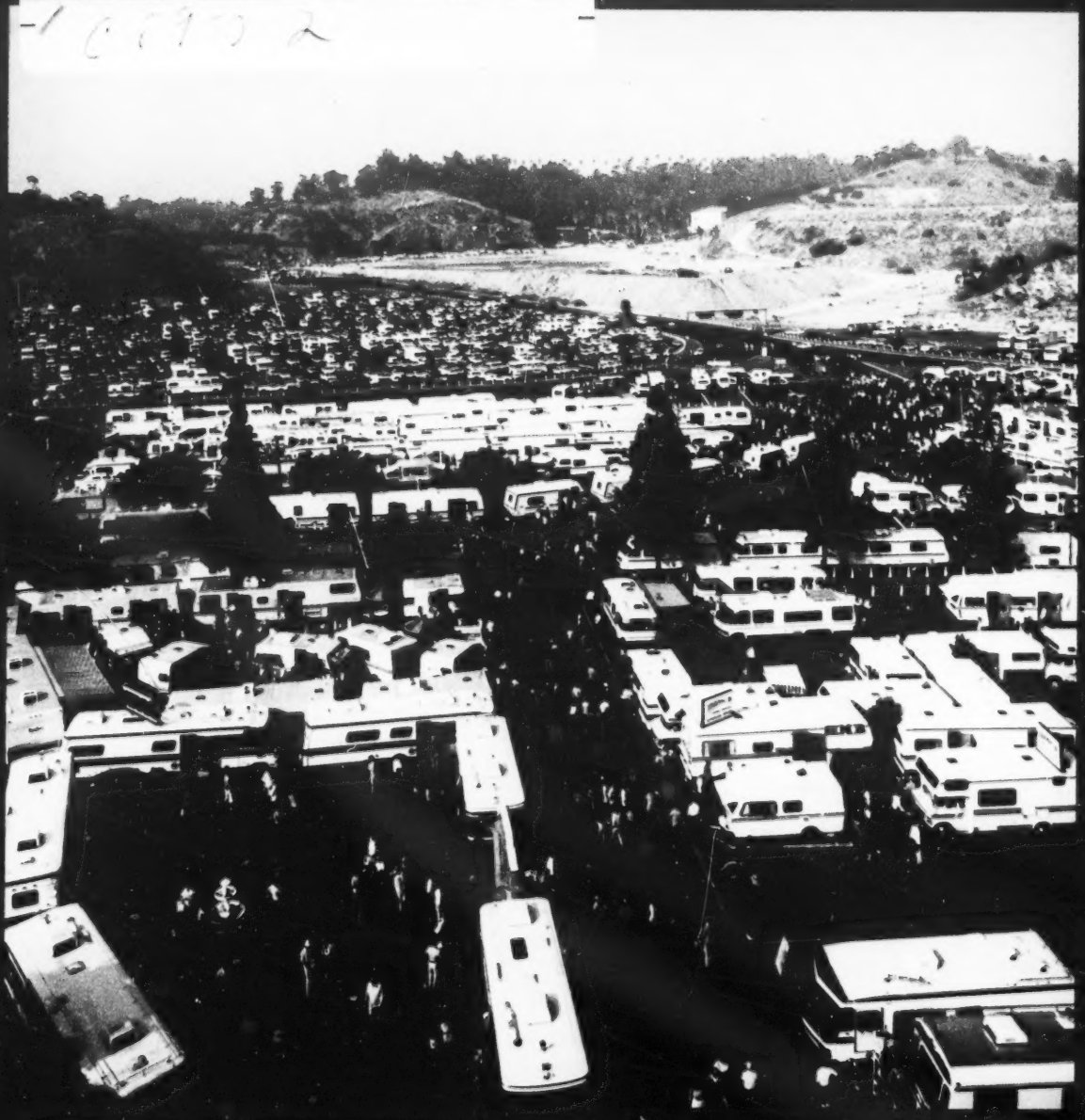
Overall, it looks like a flattening out of the upswing that we have been seeing for several months. It would appear that sales will continue rather good, but unspectacular. **rvd**

A TL Enterprises Publication

RVDealer®

THE RV BUSINESS MAGAZINE
THAT KNOWS THE RV BUYING PUBLIC

October 1981



SPECIAL SECTION: 1981 DODGER RV SHOW
(PAGES 59-64)

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Also in this issue:

RARE II: You are involved!

What Price Consumerism?

A TL Enterprise Publication

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THE RV BUSINESS MAGAZINE
THAT KNOWS THE RV BUYING PUBLIC

ON OUR COVER: Dodger 1980 . . the same site where you will find Dodger '81 waiting with new models, products—and western folk anxious to look at what's new. For all that awaits *you*—beginning with seminars even in advance of dealer days—turn to pages 59 through 64.

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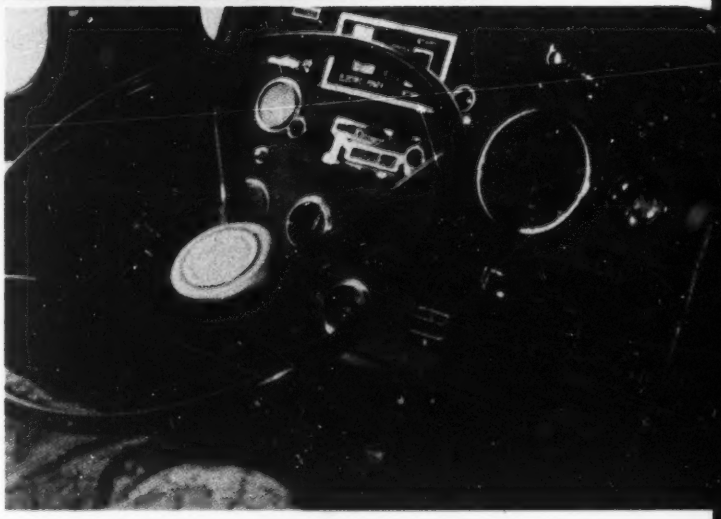

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The Exclusive Monthly RV Dealer Business Report

how's business?

SALES VOLUME OF INDIVIDUAL DAB MEMBERS	
For Month	11 up
	10 down
Year to Date	18 up
	3 down

SALES VOLUME		
For Month	This year $4,899,728	up 2%
	Last year $4,807,802	
Year to Date	This year $29,211,185	up 22%
	Last year $24,026,877	

TOTAL UNIT SALES		
For Month	This year 586	down 5%
	Last year 618	
Year to Date	This year 3509	up 8%
	Last year 3240	

NEW UNIT SALES		
For Month	This year 368	down 6%
	Last year 393	
Year to Date	This year 2173	up 3%
	Last year 2103	

USED UNIT SALES		
For Month	This year 218	down 3%
	Last year 225	
Year to Date	This year 1336	up 18%
	Last year 1137	

July was not a boom month for RV retail sales. The upward trend that has been so heartening the past three or four months has definitely leveled off. At least that's the report form RVD's Dealer Advisory Board.

Although there has been a general slow-down, a few (very few) DAB members are reporting record sales. Most are running fairly close to last July's unit sales and are up in dollars only because of higher prices.

Note: Data for this report is provided by RVDealer's own Dealer Advisory Board, which represents a cross section of all dealers in the United States.

Generally, dealers are reporting profits good, but some signs of weakening can be expected at this time of the year.

Motorhomes

NEW	For Month	This year 60	−39%
		Last year 95	
	Year to Date	This year 388	−11%
		Last year 434	
USED	For Month	This year 85	+10%
		Last year 78	
	Year to Date	This year 470	+47%
		Last year 319	

New motorhome sales took a drastic drop in July compared to last year's. Some of the larger dealers were really down. Most department store dealers were off some.

In used, the market is still strong, but not as strong as it has been. It seems quite clear that the motorhome market will remain depressed until interest rates change significantly. Or the economy takes a dramatic change for the better. Or motorhome prices come down. Right now, all three possibilities are extremely remote. Motorhomes are out of the workingman's reach. And as long as that is the case, sales will be limited.

Travel trailers

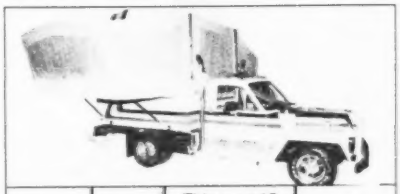
NEW	For Month	This year 90	− 1%
		Last year 91	
	Year to Date	This year 598	+14%
		Last year 523	
USED	For Month	This year 76	− 7%
		Last year 82	
	Year to Date	This year 462	− 1%
		Last year 465	

The drop isn't as great, but travel trailers, like motorhomes, fell back in July. For the year as a whole, travel trailer sales aren't all that bad compared to the previous year. But the previous year wasn't good at all, so that means sales are not strong. Most trailer specialists are more or less in a holding pattern—keeping up but seeing few signs of an upswing.

TRUCK CAMPERS:

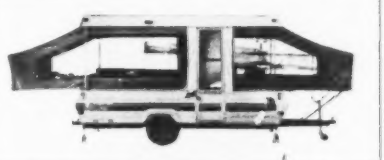
Sales of new truck camper units were down for the month compared to last July. Used unit sales were quite poor.

Truck campers



NEW	For Month	This year 12	−20%
		Last year 15	
	Year to Date	This year 107	+14%
		Last year 94	
USED	For Month	This year 13	−48%
		Last year 25	
	Year to Date	This year 128	− 6%
		Last year 138	

Folding trailers



NEW	For Month	This year 196	+ 9%
		Last year 180	
	Year to Date	This year 989	+ 3%
		Last year 963	
USED	For Month	This year 38	+ 6%
		Last year 36	
	Year to Date	This year 223	+16%
		Last year 192	

As a category, folding trailers shows better than any other. Sales were up in both new and used over last July.

Fifth-wheels

NEW	For Month	This year 10	− 17%
		Last year 12	
	Year to Date	This year 91	+ 18%
		Last year 77	
USED	For Month	This year 6	+ 50%
		Last year 4	
	Year to Date	This year 53	+112%
		Last year 25	

Fivers aren't doing well for most dealers, many of whom have given up stocking them, or are stocking only one or two. Of course part of the problem is obvious: You can't sell them if you don't have them.

In spite of the tapering off of the sales increases, dealers generally are pleased with the year. Most are up and most are making some money. A few are making a killing. It isn't the best of times, but neither is it the worst. **rvd**

WDA Prepares '81 Model Store Giveaway

Chicago, Ill.—Dealers visiting the Dodger Show are encouraged to register for the WDA model store. Some $30,000 worth of aftermarket merchandise will be given away at Louisville's RVIA show in December where the 20 x 40-foot model store will be displayed. The store, designed by Bill Brennan of Merchandising Systems, Incorporated, will allow dealers to see how easy it is to create a store of their own. In order to qualify, the dealer must have registered in either the Dodger or the Louisville show. The model store committee is co-chaired this year by Joe Tyson of Thetford, and Toby Trabert of VBT Supply Company.

South Bend Aftermarket Action

South Bend, Ind.—Aftermarket action at the South Bend show was especially evident during drawings in the supplier booths near the end of Dealer Days. At the A & E booth (top) dealers Doyle and Marilyn Thomas of Thomas Travel Trailers, Findlay, Ohio, are flanked by Max Hartman, president of Parkway Distributors (left) and Sam Stone, vice president of sales in the A & E Elkhart office. When RVD shot this picture, the Thomases had just won a trip for two to the Bahamas as a result of their show days' registration. They will accompany winning A & E dealers to the islands when the dealers get their sales incentive awards later this year.

Hartman was also part of the action at the DTI booth (above), where a gondola was given away to Charles Miller of Miller Trailer Sales. The winning entry was pulled earlier by Jim Summers, executive vice president of RVDA. Parkway, Miller's main distributor, will handle delivery of the prize to Ohio. Shown holding the winning entry with Hartman is Hal Fowler (right) owner of DTI, a store planning firm.

rvia shipment figures

The marketing committee of the Recreation Vehicle Industry Association has announced that the total number of recreational vehicles shipped from manufacturers' plants during July 1981 was 22,400, up 51.4% from July of 1980.

The shipment figures released by the association are contained in a report compiled for the membership by RVIA's marketing committee under the chairmanship of John Agno of Stirling Power Systems.

RV shipments were as follows in July 1981		July 1980	Percent Change	Cumulative 1981	Cumulative 1980	Percent Change
TRAVEL TRAILERS	5,100	3,600	+41.7%	35,400	26,800	+32.1%
FIFTH-WHEELS	900	500	+80%	7,000	3,500	+62.9%
TRUCK CAMPERS	600	400	+50%	3,300	3,300	0%
MULTI-USE VEHICLES	9,800	5,800	+69%	56,300	31,100	+47.8%
TYPE A: MOTORHOMES	1,300	900	+62.5%	8,800	5,100	+72.5%
TYPE B: VAN CAMPERS	300	200	+50%	2,500	1,700	+47.1%
TYPE C: MINI MOTORHOMES	1,700	1,500	+13.3%	10,700	8,700	+23%
FOLDING CAMPING TRAILERS	2,700	1,900	+42.1%	23,300	15,400	+51.3%
TOTALS	22,400	14,800	+51.4%	146,000	102,600	+42.3%

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